

ELEMENT I

MAY 1976

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**DALY
CITY**

REDEVELOPMENT PROJECT

PREPARED BY: THE DASA JOINT VENTURE

D'Amico & Associates, Inc., Senior Joint Venture Partner
Albert R. Seyranian, AIA, Architect & Assoc., Jr. Joint Venture Partner

**PREPARED FOR: THE REDEVELOPMENT AGENCY OF THE CITY
OF DALY CITY**

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SECTION A

AUTHOR: ECONOMICS RESEARCH ASSOCIATES

SOCIO / ECONOMICS

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Section I

INTRODUCTION

The Redevelopment Agency of the City of Daly City has undertaken a Redevelopment Project to revitalize the city's older commercial and service areas along Mission Street and Junipero Serra Boulevard. These areas have the potential to become attractive commercial centers for Daly City and surrounding areas.

To assist in the redevelopment efforts for these areas, the Daly City Redevelopment Agency has retained D.A.S.A., a joint venture of D'Amico & Associates, Incorporated and Albert R. Seyranian, A.I.A., Architects and Associates. D.A.S.A. is to conduct an independent evaluation of the proposed redevelopment project and prepare a final redevelopment plan. Economics Research Associates has been retained as a subconsultant to D.A.S.A., to provide socio-economic consulting services. ERA's efforts concentrate on an evaluation of existing conditions in the project area and an analysis of market potentials of the project.

Element I of the study involves an evaluation of existing conditions and problem identification. The primary purpose of this division of the report, is to assess the socio-economic background of the area and to recommend a marketable redevelopment program.

ERA, with the assistance of the Public Sector, a public survey firm, conducted three detailed surveys: (1) a survey of merchants in the project area; (2) a survey of households in the primary trade area, and (3) a survey of shoppers at various shopping districts in the area. Each of the surveys was analyzed by computer and the detailed tabulations have previously been submitted to the Redevelopment Agency. These separate documents should be considered as part of the socio-economic analysis of the area. They each contain extensive information

which will be valuable on a continuing basis as the redevelopment project progresses.

Based on the assessment of the socio-economic background of the area and the results of detailed surveys of merchants and shoppers, ERA evaluates the market potentials for retail space and other uses in the project area. The projected market demand for each use is converted to supportable space on site, and a redevelopment program is recommended.

This report was prepared under the supervision of J. Richard McElyea, Senior Vice President of ERA. Thomas A. Feeney, Senior Associate, had primary responsibility for conducting the research and preparing this report.

The cooperation and assistance of the staff of the Daly City Redevelopment Agency, as well as other local officials and other knowledgeable persons in the area are acknowledged with appreciation.

Section II

SUMMARY AND CONCLUSION

The key objective of this socio-economic study was to identify current problems in the project area and to project future development which can be supported in the Daly City Redevelopment Project Area (RPA). The principal finding of the study is that, despite problems of physical appearance, lack of parking, strong competition from existing major shopping centers, very limited population growth in the trade area, and a relatively poor "image" with shoppers, the RPA has some favorable market potentials to support the development of new retail and service space, as well as new major office and residential development. The two major keys to achieving development opportunities are:

- o The strong identification and success of Mission Street in selling "big ticket" items such as automobiles, TV and stereos, and home furnishings. This strength can be expanded upon to increase sales and new facilities in these categories.
- o The proximity of the Junipero Serra area of the RPA to BART and its accessibility and visibility to I-280 provide the opportunity to develop a multi-use complex of office space, new residential development and supporting retail, service and restaurant facilities.

Along with these attributes, significant assistance will be required from the City of Daly City in order to successfully implement the proposed program.

This summary section outlines the principal research findings which are presented in detail in the main body of this report.

ECONOMIC BACKGROUND

Population growth in the six-county Bay Area has slowed considerably in the last five years. Daly City's population increased at

an annual rate of 4.9 percent between 1960 and 1970, and at an annual rate of 1.6 percent during the 1970-1975 period. San Francisco's population had been declining at a rate of 1 percent per annum in the last five years. Thus, the population in the area surrounding the RPA has been relatively stable in the recent past. In 1975, Daly's City's population was estimated at 72,500. Thus, it must be recognized in protecting market demand that the trade area for the RPA is not the dynamic growth area that it was in the past.

Many residents of Daly City commute to San Francisco for work. The work force in Daly City is weighted toward professional, sales and clerical jobs, with 58 percent of jobs in Daly City in these categories. On a county-wide basis, manufacturing employment has declined while employment in trade has increased 16 percent and in services by 40 percent in the 1969 to 1974 period. Analysis of the types of employees in Daly City shows the largest category is wholesale/retail trades. The bulk of this employment is located in Westlake, and Serramonte Shopping Centers, and in the RPA.

CHARACTERISTICS OF THE RPA

The RPA exhibits the traditional problems of an older shopping district: obsolete buildings, inadequate off-street parking, and lack of a variety of merchandise. However, the area does have strong identification for "big ticket" items such as autos, television sets, and home furnishings. The existing uses in the RPA are predominantly commercial, with auto dealerships, and personal services being the largest categories in terms of square feet of space.

The average land value per square foot is \$4.71 in the RPA. The average improvement value per square foot is \$5.65. The ratios of building values to land values indicate that much of the land in the RPA is underutilized. Fifty six percent of all the land has improve-

ments on it valued at less than the land itself. In economically sound commercial areas, the value of improvements is usually several times the value of the land.

PROFILE OF MERCHANTS AND CONSUMERS

ERA undertook detailed surveys of the households in the primary trade area, of the merchants in the RPA, and of shoppers at selected shopping centers in the area. In each case, the survey analyzed the characteristics, attitudes, and suggestions of the groups surveyed.

The shopping patterns of the households in the area indicate a strong preference for Serramonte Shopping Center for most shopping needs. Ninety-three percent shop there, most once or more per month. Only 33.5 percent shop on Mission Street and 30.8 percent on Junipero Serra Boulevard. And these shoppers shop less frequently there, than shoppers in other areas.

Among those who shop in the RPA, a very high percent, 72.3, agree that the area should be redeveloped. Among all of the households surveyed, a majority agreed on just three things: (1) the area needs to be redeveloped, (2) it needs new housing, and (3) it is a good location for offices. The most frequently mentioned suggestions for improvements in the area were: recreation facilities, landscaping amenities, restaurants and a community center.

Of the merchants surveyed, a high proportion, 74 percent, have been in the area four years or longer. Also, 73 percent of the merchants are currently satisfied with their location, and only 14 percent plan to move.

When asked to evaluate the area in terms of specific characteristics, the merchants gave the highest ratings to city services. The lowest ratings were given for lack of a variety of merchandise and the attitude of other merchants towards redevelopment.

Shoppers were interviewed at five shopping districts in the area. Serramonte received the highest rating in almost every category. The RPA received high ratings for its convenience and the friendly merchants and sales people. The most commonly mentioned suggestions for improving the area were: small stores with variety, more services, and more types of stores.

MARKET SUPPORT FOR RETAIL SPACE

Our projections of demand for retail space were based on the input from several sources:

- o The shopper and household surveys, which provided information on shopping patterns, attitudes and preferences and helped us define the primary trade area as Daly City and the south central portion of San Francisco just to the north of the RPA.
- o The merchant survey which provided information on sources of customers, attitudes toward redevelopment and an indication of retail strengths to draw on.
- o A survey of buildings which provided information on the square footage of space devoted to retail uses.
- o Retail sales information for types of retail outlets in the RPA was provided by the State Board of Equalization.
- o Projections of future retail expenditures by residents of the primary trade area, based on present and future per capita retail expenditures.

With this information available, we were able to obtain a reliable indication of the level of activities and strengths and weaknesses of retail stores in the RPA at the present time and the opportunities for future increases in activity. The methodology involved projecting total retail expenditures in the primary trade area and then allocating future expenditures to the RPA based on shopping patterns, competition, and alternative levels of redevelopment efforts in the RPA by the City of

Daly City and participating merchants.

Total sales and percentage increases for selected categories are shown below for 1985.

	Total RPA Sales (1985)	Percent Increase over 1975
TV/Stereo	\$ 9.8 million	25%
Home Furnishings/Applicances	4.5	6
Groceries, Drugs	2.6	25
Autos - New	18.4	11
Total/Average	\$ 60.2 million	21%

Special potentials represented by Crocker Hills, BART riders, and on-site residents and employees were analyzed separately and are reflected in program recommendations. By comparing projected sales to standards for sales per square feet in each category, total space requirements were projected for the RPA. These space requirements formed the basis of the program recommendations summarized at the end of the summary.

MARKET SUPPORT FOR OTHER USES

In addition to retail potentials ERA analyzed market support for the following major land uses:

- (1) Services - personal/commercial, recreation, and transient accommodations.
- (2) Residential development.
- (3) Office development.

In each case the potential demand for each use and the existing competitive situation was analyzed to define market support projections on the RPA site. The results of these analyses are summarized briefly in the following paragraphs:

Personal/Commercial Services

Although we forecast increases in receipts for personal services, we have not forecast a need for net additional space in this category. Sufficient space exists to service future needs, given redevelopment efforts and more efficient use of such space.

Financial/real estate/insurance services will require an additional 7,000 square feet by 1980 and another 8,000 by 1985. However demand from Crocker Hills could require up to 3,000 square feet of personal service space by 1980. In addition, the potential support from on-site groups (BART riders, residents, employees) indicates that some new space should be provided in a multi-use complex in the Junipero Serra Corridor.

Recreation/Entertainment Facilities

It is estimated that approximately 23,000 square feet of commercial recreation space - movie theatres, family billiard parlors, arcades and other types of commercial recreation - would be required in the RPA to bring the level of commercial recreation services in line with standards for an area of this size.

Based on the size of the trade area and the present limited availability of indoor family oriented recreation facilities, we believe that there is also an opportunity to provide some of the larger forms of family recreation facilities either through the City or a commercial operator. These would include roller skating, ice skating, dancing, and meeting rooms for various recreation groups. The household survey, for instance, found that "recreation facilities" and a "youth center" had the highest ratings as suggestions to improve the area. This type of activity could be most economically carried out through the conversion of a large unused structure in the RPA. We have recently been involved in the conversion of a public building in Dallas, Texas for such uses by

a commercial operator which has proven to be very successful from a financial and community standpoint.

We have asked the planning team to examine structures in the RPA which might be used for such uses.

Transient Accommodations

ERA analyzed potential support from four sources: (1) business visitors, (2) tourists, (3) transients, (4) people visiting friends. The conclusion was that there is not enough solid sources of demand to forecast the need for a motel (although one would certainly be desirable). The best chance for success would be something developed by a popular local person that would develop a solid following for the restaurant operations, and banquets and get businesses in the area to recommend people staying there.

It may be desirable to allow for the possibility of a motel in the future. At least one alternative plan could suggest a site somewhere in the RPA.

Residential Development

The Junipero Serra site is well suited to residential development. As illustrated in the text of the report, the amount of vacant land to accommodate multiple family units is just barely adequate to meet demands for the next 10 years. Thus, the RPA could expect to capture a reasonable share of total market demand. In a market of this size, 5 percent of the total rental market would be a reasonable market share for one site. However, because of the attributes of the site, a development of multiple ownership units (townhouse/high rise) could capture up to 10 percent of the market.

Using these estimates of market share, we have projected that the RPA could support approximately 500 multiple family dwelling units by 1985. The estimated mix of housing by type, is approximately

3 to 2, rental to ownership.

Office Development

Based on an analysis of employment projections and historical absorption rates, ERA projects total annual office space absorption of approximately 400,000 square feet per annum in all of San Mateo County. The Junipero Serra corridor near the BART station is the most logical site in the RPA for office space development.

While the site has certain inherent physical and locational advantages, it faces a strong competition in a market which is not likely to be absorbing office space much faster than historical trends. San Mateo County locations will never compete directly with San Francisco as a location for headquarters or administrative offices and Daly City does not have a strong image in the county. However for those smaller tenants seeking suburban locations, the RPA site can expect to achieve reasonable penetration rates.

Taking into consideration the number of competing locations and facilities, we believe that the development of 200,000 square feet of quality office space in two phases over a 10 year development program represents a reasonable market expectation for a site on Junipero Serra Boulevard adjacent to the BART station. This represents an average annual absorption of 20,000 square feet per year or approximately 5 percent of the total San Mateo County office market. The 200,000 square feet would make the Daly City complex one of the largest in San Mateo County.

RECOMMENDED PROGRAM

Based on the detailed analyses of supportable space for each use, ERA derived a recommended program for the redevelopment project. These recommendations are summarized on the following page.

Total New Space (Square Feet)

Retail

Big ticket items (TV/stereo, furniture, etc)	42,000
Groceries, drugs, liquor, restaurants, bars	15,000 17,000
Auto-Related	<u>20,000</u>
Total	94,000

Office

200,000

Residential

500 units

Services

Personal	6,000
Commercial	15,000
Recreation	23,000

The square feet of auto-related space does not include the space for new-car dealerships which would be included in an auto center visualized in the RPA. It is anticipated that increased sales could be accommodated with approximately the same amount of space currently in use in scattered locations.

All of the new space for groceries and drugs, and personal services and approximately half of the restaurant/bar space is planned for a proposed multi-use complex near the BART station. The new space for big ticket items may best be accommodated in a special center for these items, located at the Top of the Hill, or elsewhere in the RPA.

Another retail node could be a "mini-mall," which is a small shopping center without a major tenant. Such a center would require 8 to 15 acres and could include the following type tenants: food, drug, variety merchandise, fast food. In addition, much of the new space for retail, services, and small offices would occur as in-fill along Mission Street.

Section III

SOCIO-ECONOMIC BACKGROUND

THE REGIONAL SETTING

As shown in Figure A, the Daly City Redevelopment Project (RPA) is bounded on the north by the city of San Francisco. Both Mission Street and I-280, just to the west of the area, are major connecting routes between San Francisco and Daly City and peninsula cities to the south. Because of this, and the integrated nature of the Bay Area economy, an evaluation of the regional setting is important to understand the potentials of the project area.

The Redevelopment Project Area is actually composed of two separate commercial corridors - Mission Street and Junipero Serra Boulevard. These areas represent the heaviest concentration of strip commercial development within Daly City. However, because of the linear nature of the area and the proximity of other neighborhood-serving commercial areas, the RPA does not have the identity and character of a traditional central business district.

Both the Mission Street and Junipero Serra corridors have their own unique characteristics. One of the most prominent areas along Mission Street, from a physical and commercial point of view is the "Top of the Hill" at the intersection with John Daly Boulevard. An equally important feature of the Junipero Serra corridor is its location adjacent to the Daly City BART Station.

The unique characteristics of the RPA, as well as its central location in the region are significant factors to be considered in evaluating the potentials of the area. The remainder of this subsection discusses the regional setting, while the

following subsection evaluates the RPA in more detail.

Population

Table 1 presents the population growth in the region from 1960 to 1975. As shown, the growth in the six-county area has slowed considerably in the last five years, from its 2.7 percent level during the 1960's to less than one percent during 1970 to 1975. The same is true for San Mateo County and Daly City. Daly City's population increased at an annual rate of 4.9 percent between 1960 and 1970, and at an annual rate of 1.6 percent during the 1970-1975 period. San Francisco's population, on the other hand, was declining at a slight rate during the 1960's and at an even faster rate during the 1970 to 1975 period. Thus, the area surrounding the RPA has been growing at a fairly slow rate in recent years.

Based on data from the 1970 Census, Table 2 compares the characteristics of the population in Daly City with the Bay Area Region. The characteristics are generally similar, with a few exceptions. The Daly City population is slightly younger (median age=27.2 years versus 28.5 years in the region) and a higher proportion of its population is married (67 percent in Daly City versus 63 percent region-wide). Daly City has a significantly higher proportion of Spanish American population (18.8 percent versus a regional average of 10.8 percent) and slightly higher median incomes (\$12,229 in Daly City, \$11,551 region-wide). This relatively lower-aged, higher-income population in Daly City represents a strong market potential for commercial activities in the area.

Table 1

POPULATION GROWTH IN THE REGION

<u>County/City</u>	<u>Population</u>			<u>Annual Percentage Change</u>	
	<u>1960</u>	<u>1970</u>	<u>1975</u>	<u>1960- 1970</u>	<u>1970- 1975</u>
San Francisco	740,316	715,674	671,100	-0.3%	-1.3%
San Mateo	444,387	556,234	573,900	2.5	0.6
Brisbane	--	3,003	2,810	--	-1.2
Daly City	44,791	66,922	72,500	4.9	1.6
Pacifica	20,995	36,020	39,150	7.1	1.7
San Bruno	29,063	36,254	38,600	2.4	1.2
So. San Francisco	39,418	46,646	47,950	1.8	0.5
Santa Clara County	642,315	1,064,714	1,193,400	6.5	2.4
Marin County	146,820	206,038	216,500	4.0	1.0
Alameda	908,209	1,073,184	1,089,500	1.8	0.3
Contra Costa	<u>409,030</u>	<u>558,389</u>	<u>587,200</u>	<u>3.7</u>	<u>1.0</u>
Six County Area	3,291,007	4,174,233	4,331,600	2.7%	0.7%

Source: U.S. Bureau of Census, Security Pacific Bank; and Economics Research Associates

Table 2

CHARACTERISTICS OF THE LOCAL AND REGIONAL POPULATION
1970

	<u>Daly City</u>	<u>Bay Area Region</u>
Population Per Household	3.10	2.98
Percent Under 18 Years	34.0%	33.2%
Median Age	27.2	28.5
Percent Over 65 Years	10.0%	12.9%
Percent Married	67.0%	63.0%
Percent Black	5.4%	14.6%
Percent Spanish American	18.8%	10.8%
Median School Years	12.4	12.5
Percent High School Graduates	67.8%	67.0%
Median Income	\$12,229	\$11,551
Percent Below Poverty Level	5.1%	7.3%
Percent with Income Over \$15,000	32.0%	30.0%

Source: General Population Characteristics, 1970, U.S. Dept. of Commerce,
Bureau of the Census

Income

Personal incomes have been increasing throughout the region since 1970. Table 3 shows per capita personal incomes and percent increases over the 1970 to 1973 period for the nine Bay Area counties. Both San Mateo and San Francisco Counties have higher than average personal incomes, and both have experienced greater than average increases in the recent past.

Employment

Daly City is a "bedroom community" for San Francisco, in that a large proportion of its residents commute to jobs in San Francisco. As the following text table shows this is also true of the RPA and surrounding area.

<u>Percent who work in:</u>	<u>Total Daly City</u>	<u>RPA Area</u>
San Francisco	61%	60%
San Mateo County	26	4
Other areas	13	36
Total	100%	100%

Source: 1970 Census of Population and Housing

Completion of the BART system should reinforce this trend, however the expansion of the Serramonte office development may tend to offset this. According to data from the 1970 Census, the work force within Daly City is heavily weighted toward "white collar" jobs.

	<u>Percent of Total Work Force</u>
Professional, Technical	12.5%
Managers, Administration	7.8
Sales workers	9.5
Clerical	28.3
Subtotal	<u>58.1%</u>

Table 3

PER CAPITA PERSONAL INCOME
IN THE SAN FRANCISCO BAY AREA
1970-1973

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>Percent Increase</u>
Alameda	\$4,151	\$4,852	\$5,216	\$5,609	35.1%
Contra Costa	4,914	5,187	5,556	5,944	20.9
Marin	5,840	6,046	6,603	7,038	20.5
Napa	4,183	4,419	4,609	5,084	21.5
San Francisco	5,825	6,129	6,634	7,200	23.6
San Mateo	5,619	5,910	6,355	6,852	21.9
Santa Clara	4,558	4,751	5,137	5,706	25.1
Solano	3,863	4,069	4,242	4,541	17.5
Sonoma	<u>4,127</u>	<u>4,343</u>	<u>4,643</u>	<u>4,987</u>	<u>20.8</u>
San Francisco Bay 9-County Area	\$4,950	\$5,182	\$5,567	\$6,008	21.3%
California Total	\$4,493	\$4,694	\$5,061	\$5,482	22.0%

Source: U. S. Department of Commerce, Survey of Current Business; California Department of Finance; Research Department, Security Pacific Bank; and Economics Research Associates

<u>Percent of Total Work Force (cont'd)</u>	
Craftsmen	13.7
Operators	10.8
Laborers	4.5
Service Workers	12.1
Other	0.8
Total	<u>100.0%</u>

More recent figures on San Mateo County employment from the State of California Employment Development Department indicate that this trend has continued. As shown in Table 4, during the 1969 to 1974 period, manufacturing employment has declined 14.7 percent, while employment in trade has increased by 6.1 percent, in finance, insurance and real estate by 40.2 percent, in services by 39.6 percent, and in government by 27.7 percent.

While the figures are not available for Daly City, Table 5 presents comparative data on the number of establishments in various industry categories for San Mateo County and Daly City. As shown, Daly City's share of the county totals is largest in the categories of Transportation/Communication/Utilities (TCU), wholesale/retail trade, and finance/insurance/real estate (FIRE). The largest categories are wholesale/retail trade with 399 establishments. The bulk of the employment in this category is located in the Westlake and Serramonte shopping centers and in the Mission Street corridor.

THE PROJECT AREA

Existing conditions in the project area create constraints and influence opportunities for future development and redevelopment. The Mission Street corridor contains a mix of commercial, residential and institutional land uses. Many of the commercial businesses established themselves when Mission Street was the main connecting link between San Francisco and the cities on the south peninsula. The Junipero Serra corridor is characterized

Table 4

ESTIMATED EMPLOYMENT^{1/} IN SAN MATEO COUNTY
July 1969-1974

	1969	1974	Increase 1969-1974	
			Number	Percent
Nonagricultural Wage and Salary Workers	185,500	204,600	19,100	3.2%
Mineral Extraction	--	--	--	--
Construction	12,300	9,000	-3,300	-26.8
Manufacturing	35,200	30,000	-5,200	-14.7
Durable Goods	24,800	19,600	-5,200	-20.9
Lumber and Furniture	900	700	-200	-22.2
Primary and Fabricated Metals	5,200	6,700	1,500	28.8
Nonelectrical Machinery	2,400	2,600	200	8.3
Electrical Machinery	13,000	7,700	-5,400	-41.2
Transportation Equipment	900	300	-600	-66.6
Other Durables	2,300	1,600	-700	-30.4
NonDurable Goods	10,400	10,400	0	0
Food Canning and Preserving	300	300	0	0
Other Food	2,300	2,600	300	13.0
Textiles and Apparel	400	300	-100	-25.0
Paper and Printing	3,300	3,600	300	9.0
Chemicals and Petroleum	3,200	2,000	-1,200	-37.5
Other NonDurables	900	1,600	700	77.7
Transportation, Communication, Utilities	31,300	30,200	-1,100	-3.5
Trade	44,700	51,900	7,200	16.1
Wholesale	14,700	17,000	2,300	15.6
Retail	30,000	34,900	4,900	16.3
Finance-Insurance-Real Estate	7,200	10,100	2,900	40.2
Services	28,500	39,800	11,300	39.6
Government	26,300	33,600	7,300	27.7
Agriculture	2,400	2,300	-100	-4.1

1/ Employment reported by place of work. Does not include persons involved in labor-management trade disputes.

Source: State of California Employment Development Department; and Economics Research Associates

Table 5

NUMBER OF ESTABLISHMENTS BY
INDUSTRY CATEGORY IN THE REGION
1973

<u>Industry Type</u>	<u>Wages Per Employer^{1/}</u>	<u>San Mateo County</u>	<u>Number of Establishments</u>	
			<u>Daly City</u>	<u>Percent of County</u>
Agricultural, Fishing, Forestry	\$9,200	350	15	4.2%
Mining	17,780	4		
Construction	12,250	850	65	7.6
Manufacturing	10,780	750	26	3.4
Transportation/Communication/ Utilities	12,530	240	29	12.0
Wholesale/Retail	7,890	3,400	399	11.7
Financial/Insurance/Real Estate	8,250	760	94	12.3
Services	7,600	3,000	311	10.3
Government	<u>9,850</u>	<u>120</u>	<u>n. a.</u>	<u>n. a.</u>
Average/Total	\$9,740	9,500	955	10.0%

^{1/} Based on San Mateo County.

Source: U.S. Department of Commerce, Preliminary Figures from 1972 Census of Manufacturers; Contacts Influential, 1973, published by Influential Contacts, Ltd., Inc., for the San Francisco Peninsula (which states that a minimum of 96 percent of all employers in the community are listed in its directory); and Economics Research Associates

by "strip commercial" development and light industrial uses.

Both of these areas exhibit the same problems of obsolete buildings, inadequate off-street parking and traffic congestion. In addition, the lack of landscaping and other shopping amenities detracts from the appeal of the area as a shopping district. The creation of outlying shopping centers and the opening of Interstate 280 has also contributed to the decline of the area.

At the same time, these areas are currently providing a variety of shopping and service opportunities which are essential to the local area and a number of retailers market to a wider region. The Redevelopment Project provides an opportunity to improve the quality of shopping facilities available to the local population, while strengthening the base of merchandise which appeals to a wider market. An understanding of the existing conditions in the area is essential to guiding the redevelopment efforts. The remainder of this section reviews and evaluates the RPA.

Existing Uses

The Daly City Redevelopment Project Area is shown in Figure B. A detailed survey of the conditions of existing structures in the RPA has been undertaken and will be utilized in subsequent planning stages. This subsection provides a summary of the types of uses in the RPA. Table 6 presents a summary of the land area in the RPA. As shown, there are 389 parcels in the total area. The total amount of taxable land area is 2.4 million square feet or approximately 55 acres. Of this, 2.1 million square feet, or 87.5 percent, is located in the Mission Street corridor.

There are a wide variety of uses currently in the RPA. Table 7 summarizes the amount of building space for various types



0 1 2 3 4 500ft
December - 1975

PROJECT AREA BOUNDARY MAP

DALY CITY REDEVELOPMENT PROJECT
REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER

PREPARED BY 

Table 6

DISTRIBUTION OF LAND AREA
IN THE PROJECT AREA

	<u>Junipero Serra</u>	<u>Mission Street</u>	<u>Total Project Area</u>
Number of Taxable Parcels	50	339	389
Number of Exempt Parcels	2	5	7
<u>Land Area (Square Feet)</u>			
Taxable	303,995	2,104,162	2,408,157
Tax Exempt	8,736	92,602	101,338
Street Area	<u>277,066</u>	<u>1,671,770</u>	<u>1,948,836</u>
Total	589,797	3,868,534	4,458,331
<u>Land Area (Percent)</u>			
Taxable	52%	54%	54%
Tax Exempt	1	2	2
Street Area	<u>47</u>	<u>44</u>	<u>44</u>
Total	100%	100%	100%

Source: Redevelopment Agency of Daly City and Economics Research Associates

of commercial uses. In total, there are approximately 900,000 square feet of commercial space in the RPA. However, this figure includes outdoor display space in some cases, most notably for new and used auto dealers. Auto-related uses occupy over 366,000 square feet of space or 41 percent of total commercial space in the RPA. Next in importance is the personal services category, which constitutes 12.1 percent of the total.

In addition to these commercial uses, the RPA contains 20 single family residences and approximately 106 apartment units. There are also a number of buildings used by public agencies and community service groups.

Relative Share of Retail Sales

In the section of this report, dealing with the market support for retail space, the recent trends in the sales of the RPA are analyzed in detail. For purposes of this overview of existing conditions in the project area, the relative share of sales going to the RPA is summarized in Table 8.

Between 1969 and 1974, San Mateo County's share of the total retail sales in San Mateo and San Francisco Counties increased in every category of merchandise. As shown, the San Mateo County share gained 11.3 percent in general merchandise, 12.6 percent in furniture, and 12.1 in auto and auto supplies. Overall, San Mateo County's share of the total increased by 6.5 percent.

During the same period, Daly City's share of total retail sales in San Mateo County increased only 0.2 percent. In 1974, Daly City's retail sales represented 8.7 percent of the county total. At this time, Daly City's population represented approximately 13 percent of the county. Furniture experienced the largest increase, with Daly City's share of the county increasing by 13.4 percent. Daly City's share of total sales in drugs, groceries and package liquor declined, as population increases occurred elsewhere in the County.

Table 7
GROSS COMMERCIAL BUILDING SPACE
IN THE PROJECT AREA

	<u>Square Feet</u>	<u>Percent of Total</u>
Apparel, General Merchandise, and Specialty	60,000	6.6%
T. V. /Stereo and Repair	40,430	4.4
Home Furnishing/Appliances	49,420	5.4
Building Materials	68,370	7.5
Groceries and Drugs	57,525	6.3
Auto Dealers - Used ^{1/}	93,530	10.3
Auto Dealers - New ^{1/}	150,050	16.6
Restaurants/Taverns/Bars	39,130	4.3
Service Stations ^{2/}	13,670	1.5
Auto Repairs/Supplies	109,270	12.1
Personal Services	109,000	12.1
Financial-Insurance-Real Estate	32,000	3.5
Motels	<u>78,000</u>	<u>8.6</u>
Total	900,395	100.0%

1/ Includes outdoor display.

2/ Includes buildings only.

Source: Redevelopment Agency of Daly City and Economics Research Associates

Table 8

TRENDS IN RELATIVE SHARES OF RETAIL SALES IN THE AREA
1969-1974

	San Mateo County as Percent of San Mateo and San Francisco Counties			Daly City as Percent of San Mateo County			Project Area As Percent of Daly City
	<u>1969</u>	<u>1974</u>	<u>Change</u>	<u>1969</u>	<u>1974</u>	<u>Change</u>	<u>1973</u>
Apparel	26.1%	28.8%	2.7%	20.5%	21.0%	0.5%	3.3%
General Merchandise	35.0	46.3	11.3	24.2	27.2	3.0	
Specialty	20.6	23.2	2.6	7.4	9.8	2.4	
Furniture	35.7	48.3	12.6	11.3	24.7	13.4	67.6
Drugs	49.7	54.2	4.5	16.2	15.9	-0.3	12.2
Groceries	41.9	47.9	6.0	10.5	8.3	-2.2	
Package Liquor	37.4	41.2	3.8	5.3	4.5	-0.8	
Restaurants/Bars	26.5	32.0	5.5	8.4	10.2	1.8	20.0
Building Materials	58.7	59.2	0.5	4.9	4.9	0.0	85.7
Autos and Supplies	48.4	60.5	12.1	10.6	7.9	-2.7	100.0
Service Stations	39.3	57.0	17.7	12.0	7.7	-4.3	--
Services	27.4	27.9	0.5	n. a.	n. a.	n. a.	--
All other	<u>37.1</u>	<u>43.5</u>	<u>6.4</u>	<u>1.8</u>	<u>1.5</u>	<u>-0.3</u>	<u>--</u>
Total	35.6%	42.1%	6.5%	8.5%	8.7%	0.2%	27.9%

Source: California State Board of Equalization and Economics Research Associates

It is significant that, while San Mateo County's share of the two-county total of auto sales increased by 12.1 percent, Daly City's share of the county total declined by 2.7 percent.

Detailed data on retail sales in the RPA are not available for the entire five year period. However, Table 8 shows the approximate share of Daly City's retail sales which occurred in the project area. Only 3 percent of the total sales of apparel, general merchandise and specialty goods occurred in the RPA. Twelve percent of Daly City's sales of drugs, groceries and liquor occurred in the RPA. The largest shares for the project area were in furniture, building materials, and autos. In total, almost 28 percent of Daly City's retail sales occurred in the RPA.

Property Values

The level of land and improvement value in the area is a good measure of the economic condition there. In order to analyze property values, assessed valuation for land and improvements in the project area were collected from the County Tax Assessor's rolls for the RPA. This information is summarized in Table 9. The average land value per square foot in the RPA is \$4.71. The average is slightly higher along Mission Street, \$4.75 per square foot, than along Junipero Serra, where it is \$4.45 per square foot. The range of values was from \$2.50 to \$7.84 per square foot.

By comparing the value of improvements to the square feet of the buildings, a value per square foot was also calculated for improvements. For the total project area, the average value per square foot for improvements is \$5.65. The range of values was from \$2.77 to \$13.10 per square foot.

Another useful measure of economic conditions is to compare improvement value of buildings to land value. In general, a real estate market of a commercial district that is economically sound

Table 9

PROPERTY VALUES IN THE PROJECT AREA

	<u>Junipero Serra</u>	<u>Mission Street</u>	<u>Total Project Area</u>
Land Value	\$1,352,777	\$9,994,769	\$11,347,546
Land Area (Square Feet)	303,995	2,104,162	2,408,157
Value Per Square Foot	\$4.45	\$4.75	\$4.71
Improvements Value <u>1/</u>	\$833	\$4,308	\$5,141
Building Area (Square Feet)	150,000	759,000	910,000
Value Per Square Foot	\$5.52	\$5.67	\$5.65
Land + Improvement Value	\$2,186,080	\$14,302,800	\$16,488,880
Land Area (Square Feet)	303,995	2,104,162	2,408,157
Value Per Square Foot	\$7.19	\$6.80	\$6.85

1/ Improvement values estimated as difference between land value and land value plus improvements.

Source: Redevelopment Agency of Daly City; County Tax Assessor; and Economics Research Associates

has improvements worth several times the value of the land. If this is not the case, it suggests that the area is not being developed to the intensity and quality of commercial activity needed to utilize the land to its full potential.

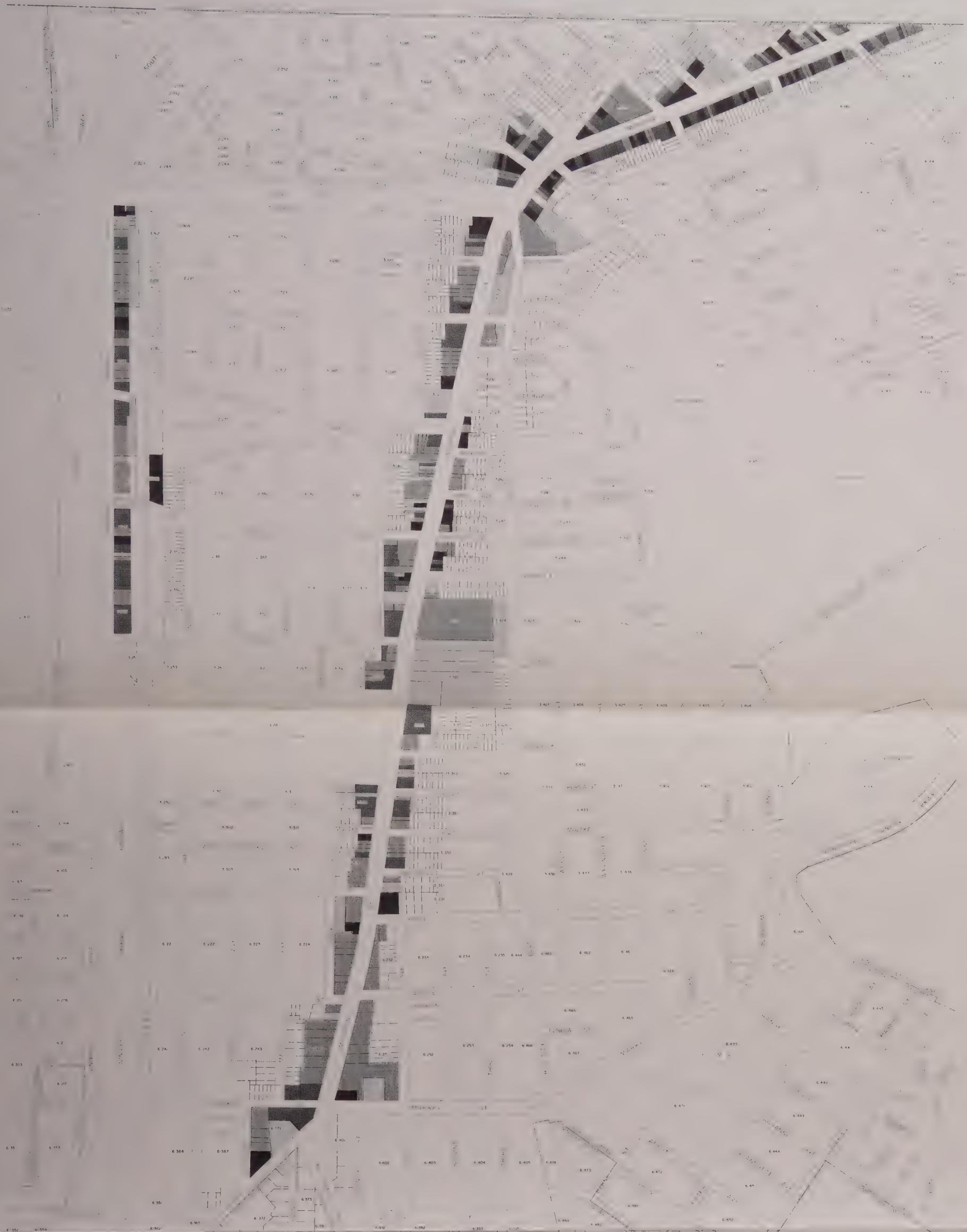
A sample of 65 parcels in the project area was selected for this evaluation. The results of this comparison are presented in the following text table.

<u>Building Value to Land Value Ratio</u>	<u>Percent of Parcels</u>
.00 - .99	56%
1.00 - 1.99	32
2.00 and over	12
	<u>100%</u>

Fifty-six percent of the parcels in the RPA have improvements valued at less than the value of the land. Only 12 percent of the parcels have improvements valued at two or more times than the value of the land.

The distribution of property values throughout the RPA will be an important factor in subsequent planning stages. Figure C shows the location of parcels in various categories of property value. Figure C calculates property values as the value of land plus improvements per square foot of land. Thus, they are not directly comparable to value figures calculated above. The light shading in Figure C graphically depicts the areas of lowest value, which are generally areas where building conditions are the worst.

In addition, ERA obtained information on current rent levels throughout the project area, from local realtors. Information on selected commercial properties is presented in Table 10. As shown, the rents per square foot vary considerably throughout the RPA, from a low of \$4.68 for a property in the 3300 block of San Jose Avenue to \$43.06 per square foot for a property in the 6400 block of Mission Street. This wide difference in rent levels is accounted for by a number of



LEGEND

- \$3.99 & under (per sq. ft.) •
- \$4.00 to \$7.99
- \$8.00 to \$11.99
- \$12.00 & over

Note: information shown on this map compiled from San Mateo Co. records

• values shown are for land per improvements and have been estimated at four (4) times assessed value.



0 1 2 3 4 500ft
March 1976

PROPERTY VALUES

DALY CITY REDEVELOPMENT PROJECT

REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER

PREPARED BY **C**

Table 10

PROJECT AREA RENT LEVELS
COMMERCIAL PROPERTIES

<u>Address</u>	<u>Leasable Area Sq. Ft.</u>	<u>Rent (Per Year)</u>	<u>Annual Rent Per Sq. Ft.</u>
6400 Block of Mission	6500	\$32,834	\$ 5.05
6400 Block of Mission	2480	32,400	13.06
6300 Block of Mission	1340	14,400	10.74
6500 Block of Mission	1800	10,200	5.66
2000 Block of Junipero Serra	1200	9,600	8.00
7300 Block of Mission	1140	8,800	7.71
3300 Block of San Jose	960	4,500	4.68

Source: George Smith, Trinity Realty, and Economics Research
Associates

factors including (1) gross area leased, (2) date of lease, (3) condition of building, (4) location of building, and (5) use of the building.

In general, property values in the RPA are considerably below their potential, indicating the area is underdeveloped. This is further indicated by the low rent levels in some buildings compared to higher rents obtained elsewhere in the RPA.

Section IV

PROFILE OF MERCHANTS AND CONSUMERS

To obtain more recent and complete information on the project area, ERA conducted three extensive surveys. The merchants in the RPA were surveyed through a detailed questionnaire and personal interviews. The households living in the primary trade area were surveyed by telephone. A survey of shoppers was conducted in a major shopping area in the primary trade area. Each of these surveys were designed to obtain information on three topics:

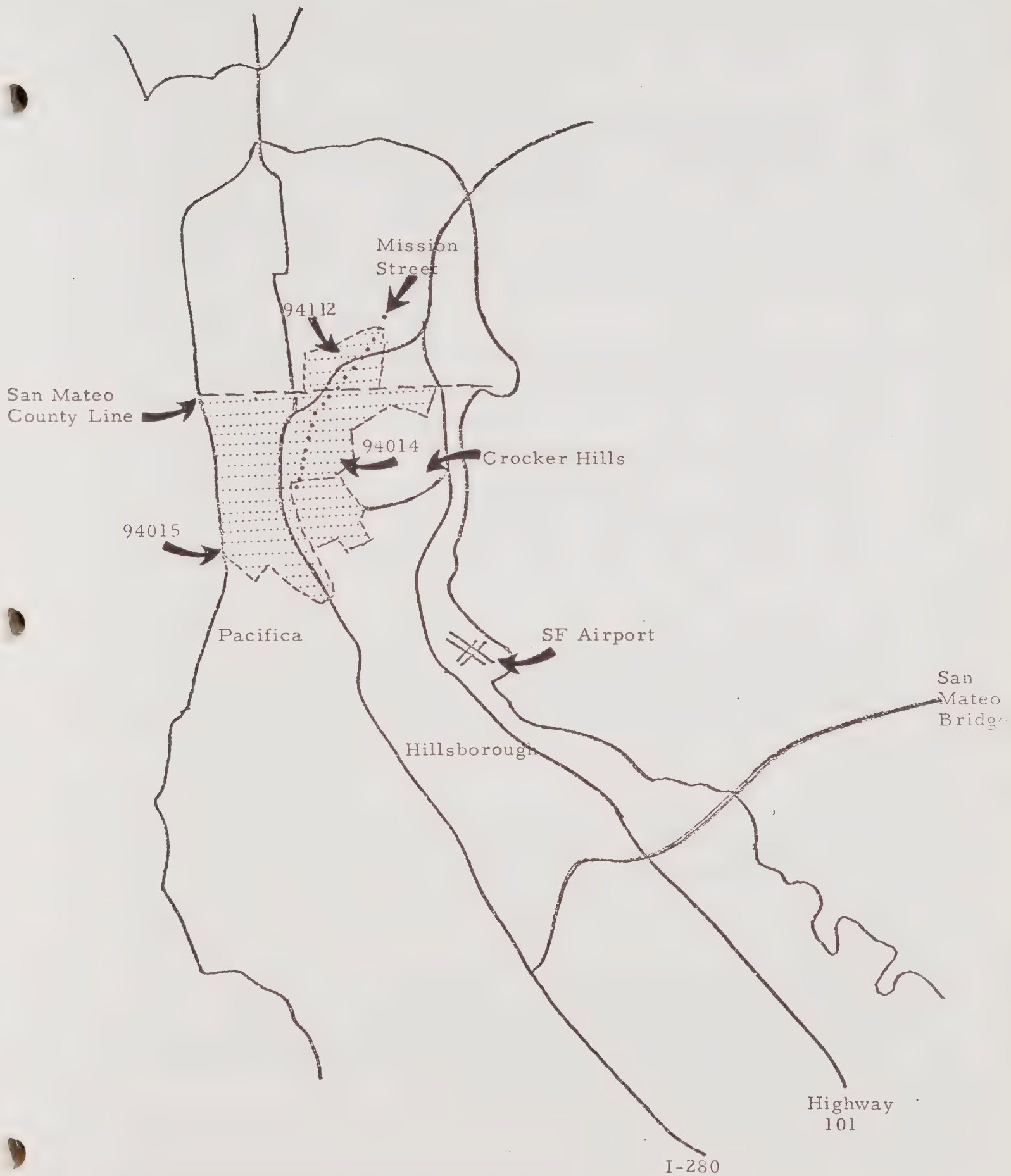
- (1) The characteristics of the respondents,
- (2) The attitudes of the respondents to the Daly City Redevelopment Project Area, and
- (3) Suggestions and recommendations on how to improve the area.

This section of the report summarizes the results of these three surveys. Based on the results of these surveys a detailed data base on the RPA and its markets has been prepared. This data base will be a valuable working tool in subsequent stages of the planning. A copy of all of the computer calculations on this data has been provided to the Daly City Redevelopment Agency.

Naturally, this report cannot cover all of the information contained in the survey. This section briefly summarizes the most important findings to suggest the ways in which the consultants have used this information in the planning effort, and the potential uses of this data in subsequent planning stages. Each of the three surveys are discussed in separate subsections below.

HOUSEHOLD SURVEY

The household survey was conducted in the primary trade area, shown in Figure D. This area is defined in detail in the section of this report dealing with the market for retail development. In general, the



DEFINITION OF PRIMARY TRADE AREA

primary trade area consists of all of Daly City and the south central portion of San Francisco just north of the RPA. ERA and the Public Sector (a public survey firm) designed the questionnaire. The Public Sector conducted in-depth telephone interviews with 500 randomly selected households in the primary trade area. The results of the interviews were processed and tabulated by computer.

Characteristics of Households

Table 11 summarizes the characteristics of the households surveyed. The data is presented separately for each of the zip codes in the area.

The median age of households surveyed is 38.6 years. This is higher than the median age of the population because only adults were included in the survey. There does not appear to be any significant difference in the age distribution among the three zip code areas. The median household size reported was 3.23. Again, this is higher than the overall average, because fewer single-member households were in the sample.

The median income reported by the households is \$13,521. This is 10 percent higher than the \$12,229 figure reported in the 1970 Census. The results of the survey indicate that the income distribution is somewhat lower in the San Francisco portion of the primary trade area.

Shopping Patterns

The household survey also obtained information on the shopping and purchasing patterns of households in the primary trade area. Table 12 summarizes the information regarding where the respondents shop and how often. Table 13 summarizes information on the kinds of purchases made at various shopping areas.

In response to a question concerning where they shop, 94 percent of the respondents answered that they do shop at Serramonte shopping center. This is an extremely high proportion even for a regional shopping center and indicates the strong market appeal of Serramonte. The next

Table II
CHARACTERISTICS OF HOUSEHOLDS SURVEYED

<u>Characteristic</u>	<u>Zip Code</u>		<u>94112</u>	<u>Total</u>
	<u>94014</u>	<u>94015</u>		
<u>Age</u>				
65 and over	4.8%	2.4%	9.1%	4.9%
55-64	16.1	12.1	14.7	13.8
45-54	21.8	19.4	18.9	19.8
35-44	17.7	19.0	16.1	17.9
25-34	20.2	27.5	23.1	24.5
18-24	19.4	19.4	18.2	19.1
Median	40.9	36.6	40.5	38.6
<u>Number in Household</u>				
1	9.8%	9.4%	10.4%	9.8%
2	34.1	28.6	34.0	31.4
3	19.5	24.1	16.7	20.9
4 or more	36.6	37.9	38.9	37.9
Median	3.20	3.26	3.20	3.23
<u>Income Category</u>				
Under \$6000	11.7%	5.3%	6.2%	7.1%
\$6000-8,999	8.8	9.7	18.8	12.2
9000-11,999	21.5	16.0	25.1	20.0
12,000-14,999	23.5	21.9	18.1	21.1
15,000-19,999	20.5	27.8	18.8	23.5
20,000-29,999	7.8	16.5	11.0	12.9
30,000 and over	5.8	2.4	1.5	2.9
Median	\$13,020	\$14,601	\$12,000	\$13,521
<u>Sex</u>				
Male	37.9%	34.0%	32.4%	34.5%
Female	62.1	66.0	67.6	65.5

Source: The Public Sector; and Economics Research Associates



Table 12

SHOPPING PATTERNS OF HOUSEHOLDS SURVEYED

<u>Center</u>	<u>Do Shop</u>	<u>For Those Who Do Shop</u>		
		<u>Once a Week</u>	<u>1-3 Times Per Month</u>	<u>2-3 Times Per Year</u>
Serramonte	93.6%	54.3%	39.7%	5.4%
Stonestown	62.5	16.4	44.9	23.8
Downtown S. F.	50.1	23.2	29.0	23.6
Westlake	72.1	37.3	37.0	16.6
Mission Street	33.5	24.9	32.4	19.7
Serra Center	57.8	28.1	47.8	15.4
Junipero Serra St.	30.8	17.0	37.1	28.3
Tanforan	79.7	22.6	51.0	19.4

Source: The Public Sector and Economics Research Associates

Table 13

PURCHASING PATTERNS OF HOUSEHOLDS SURVEYED

<u>For These Items</u>	<u>Percent Who Made Last Purchase At:</u>				
	<u>Serra- Monte</u> ^{1/}	<u>West- lake</u>	<u>Any Center</u>	<u>Project Area</u>	<u>Local or Other</u>
Groceries	29.2%	15.3%	56.3%	10.1%	33.3%
Banking	10.6	18.0	37.1	13.3	46.1
Laundry/Cleaners	9.1	10.3	27.6	9.5	43.7
Automobile	12.4	1.5	17.0	9.7	50.3
Hardware	12.4	5.8	27.7	7.7	43.5
Auto Repair	11.8	2.7	27.1	10.8	40.6
Dining Out	15.3	8.3	28.0	5.0	51.5
Clothing	54.0	8.1	78.1	1.4	15.1
Entertainment	19.1	2.3	23.4	2.4	49.8

^{1/} Includes Serra Center.

Source: The Public Sector and Economics Research Associates

most frequently mentioned shopping area was Tanforan. Only 33.5 percent said they shop on Mission Street and 30.8 percent said they shop on Junipero Serra Boulevard, while 72.1 percent of the respondents said they do shop at Westlake.

Not only do most households shop at Serramonte, but they also shop there more frequently. Ninety-four percent of those who shop at Serramonte shop there one or more times per month, and over 54 percent shop there at least once a week. Along Mission Street, 57.4 percent shop there once a month or more; and along Junipero Serra, 54.1 percent shop with similar frequency.

Table 13 shows the percent of households which made their last purchases of various items at various shopping areas. In every one of these categories, more respondents made their last purchase at Serramonte and Serra Centers, with one exception - banking. The RPA shows the most strength in purchases of groceries, banking, automobiles and auto repairs. It is obvious that the project area faces very strong competition from other areas even for those items which are most frequently purchased in the project area.

Attitudes Concerning the Area

Some additional insights into why these shopping patterns occur may be gained by examining attitudes toward the project area. Table 14 summarizes the findings of the attitudes of various types of households toward the project area. In general, there is a surprising amount of consistency of attitudes even among the households with diverse characteristics. Two exceptions are that a larger percent of younger households (age 18-24 years) feel that nighttime entertainment and recreational facilities would improve the area.

Among those who shop in the project area, 69 to 72 percent agree that the area should be redeveloped.



Table 14

ATTITUDES OF HOUSEHOLDS SURVEYED

Issue	Shop In:		Over	Age	Income		Total
Agree that:	M.S.	J.S.	65	18-24	Under \$9000	Female	Sample
Good Auto/TV Shop	46.2%	46.5%	40.0%	41.0%	42.8%	38.7%	41.4%
Should Redevelop	72.3	69.2	45.0	69.2	68.1	66.8	68.6
Need New Housing	54.3	51.6	55.0	51.0	59.0	48.3	50.1
Not Safe	39.9	44.7	25.0	35.9	39.3	42.1	42.1
Good Neighborhood Shops	54.3	48.4	50.0	52.6	48.4	43.5	47.0
P.A. Serves Locals	36.4	39.6	30.0	33.3	34.8	34.7	36.9
Good for Offices	51.4	54.1	40.0	53.8	50.0	52.8	52.2
Would Improve Area:							
Medical/Dental	76.3%	71.7%	56.0%	65.3%	65.4%	64.3%	65.4%
Office Space	56.5	60.4	28.0	56.1	48.8	56.3	54.2
Night Entertainment	58.4	61.0	36.0	69.4	51.1	50.6	54.2
Churches	45.1	31.6	32.0	36.7	40.4	37.5	36.0
Recreation	84.4	83.6	36.0	84.7	71.4	70.8	73.3
Benches/trees	85.5	87.4	60.0	84.7	76.1	77.1	79.3
Restaurants	74.0	75.5	48.0	74.5	64.2	68.5	69.1
Clothing Stores	63.6	56.0	44.0	69.4	60.7	56.0	54.4
Taverns/bars	17.9	18.9	0.0	28.6	16.6	14.3	17.0
Youth Center	83.8	83.0	56.0	83.7	76.1	78.6	76.4
Familiar with M.S.							72.3
Familiar with J.S.							69.4

Source: The Public Sector and Economics Research Associates



Among all the households surveyed, a majority agreed on just three things, (1) the area needs to be redeveloped; (2) it needs new housing, and (3) it is a good location for offices.

MERCHANT SURVEY

The profile of merchants in the RPA was developed on the basis of a detailed questionnaire sent to every merchant, as well as personal interviews conducted with a selected sample of merchants. The statistics in this report are derived primarily from the merchant questionnaire. The merchant interviews have been utilized to answer specific questions and to provide the consultants with a better sense of what the merchants attitudes and suggestions are concerning the RPA. As the planning effort proceeds, the merchant interviews will provide a valuable source of ideas on the problems and opportunities of the area.

Characteristics of Merchants

Table 15 summarizes the characteristics of the merchants in the project area. The respondents were fairly evenly distributed among the business categories of trade, auto-related services and industrial uses. The length of tenure in the project area among the merchants responding is extremely high. Seventy-five percent of the merchants indicated that they have been in the area five years or more. Twenty-five percent indicated that they have been in the area over 20 years.

Also, the level of satisfaction with the project area among the merchants is relatively high. Seventy-three percent are satisfied, versus 24 percent who are not satisfied. This is further evidenced by the fact that only 14 percent currently have plans to move from the area, and half of these plan to move to another location in Daly City.

Business Patterns

Tables 16 and 17 present data on the origins of business as reported by merchants in various locations and in various types of business.



Table 15

CHARACTERISTICS OF MERCHANTS IN THE PROJECT AREA

	<u>Percent of Total Responses</u>
<u>Business Type</u>	
Trade	22%
Food/Beverage	8
Auto-related	19
Building Materials	3
Services	17
Office	13
Industrial	18
<u>Age of Business</u>	
Less than 1 Year	10%
1-3 Years	15
4-5 Years	10
6-10 Years	22
11-20 Years	17
More than 20 Years	25
<u>Satisfied with Current Location</u>	
Yes	73%
No	24
<u>Plan to Move (in 2 years)</u>	
Yes	14%
No	78
<u>If Plan to Move, Where?</u>	
Another Part of Daly City	50%
Another City	50

Source: The Public Sector and Economics Research Associates

Table 16

ORIGINS OF BUSINESS
BY MERCHANT TYPE

<u>Percent of Business From:</u>	<u>Total Respondents</u>	<u>Trade</u>	<u>Food/ Bev.</u>	<u>Auto</u>	<u>Services</u>
Daly City - East of I-280	30%	31%	54%	21%	46%
Daly City - West of I-280	16	14	6	16	22
Daly City - Near Cow Palace	6	8	2	5	9
Daly City - South of Eastmore	<u>7</u>	<u>9</u>	<u>4</u>	<u>7</u>	<u>8</u>
Subtotal	59%	62%	66%	49%	85%
South San Francisco	10	9	5	10	11
Pacifica and San Bruno	5	6	1	7	3
San Francisco and Other	<u>26</u>	<u>23</u>	<u>28</u>	<u>34</u>	<u>1</u>
Total	100%	100%	100%	100%	100%

Source: The Public Sector and Economics Research Associates

Table 17

ORIGINS OF BUSINESS
BY MERCHANT LOCATION

<u>Percent of Business from:</u>	<u>Lower Mission</u>	<u>Upper Mission</u>	<u>Junipero Serra</u>
Daly City - East of I-280	37%	28%	12%
Daly City - West of I-280	15	14	17
Daly City - Near Cow Palace	8	4	5
Daly City - South of Eastmore	<u>5</u>	<u>7</u>	<u>8</u>
Subtotal	65%	53%	42%
South San Francisco	7	7	7
Pacifica and San Bruno	4	5	7
San Francisco and Other	<u>24</u>	<u>35</u>	<u>44</u>
Total	100%	100%	100%

Source: The Public Sector and Economics Research Associates

In Table 16, the percents represent the weighted average percent of business originating from each area. However, these percents have not been weighted to reflect the fact that auto sales are several times as high as food and beverage sales and so forth.

As shown in Table 16, 30 percent of the total business is reported to originate in Daly City, east of I-280. Almost 60 percent originates someplace in Daly City. As would be expected, the largest share of business originates in Daly City for those merchants in the services and food and beverage categories. Also, it is the auto-related businesses which reported the highest proportion of their business comes from San Francisco and other areas.

It is also interesting to examine the origins of business as reported by merchants in various locations in the RPA. As shown in Table 17, the Junipero Serra corridor draws from a wider area, with 58 percent of its business originating outside of Daly City. Even along Mission Street there is a considerable difference in the origin of business reported by merchants on "upper" and "lower" Mission. Merchants north of John Daly Boulevard draw 47 percent of their business from outside of Daly City compared to only 35 percent for the merchants south of John Daly Boulevard.

Table 18 summarizes the merchants' responses concerning their competition. Of the eight competing areas mentioned, only one was considered to offer more than "moderate" competition. Serramonte was given an average weight of 2.3 or "moderate to strong" competition by food and beverage merchants. Serramonte was consistently rated as one of the strongest sources of competition in every category. Auto-related merchants which draw the greatest percent of business from a wide area, weighted "other areas" as moderate to strong competition supporting the fact that they are competing in a wider market.

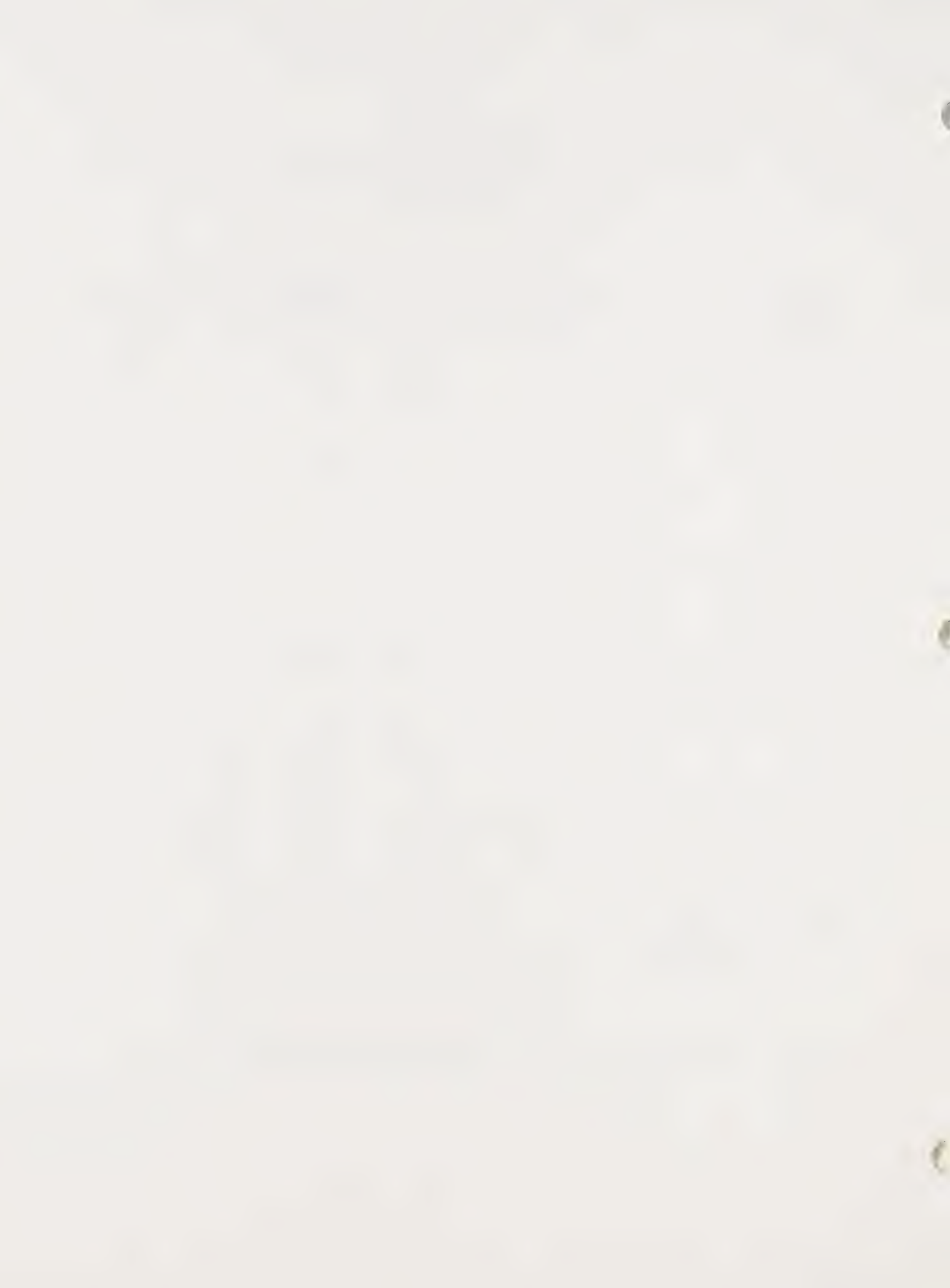
Table 18

ATTITUDES CONCERNING COMPETITION
BY MERCHANT TYPE

<u>How strong is competition from?</u>	<u>Importance Weight</u>				
	<u>All Respondents</u>	<u>Trade</u>	<u>Food/ Beverage</u>	<u>Auto</u>	<u>Services</u>
Serramonte	1.8	1.9	2.3	1.8	1.7
Stonestown	1.4	1.4	1.8	1.1	1.3
Serra Center	1.4	1.5	1.8	1.3	1.3
Westlake	1.6	1.8	1.6	1.2	1.5
Skyline Plaza	1.2	1.2	1.0	1.1	1.2
St. Francis	1.1	1.2	1.0	1.0	1.2
Downtown Brisbane	1.1	1.2	1.0	1.0	1.0
Outer Mission	1.4	1.6	1.6	1.5	1.3
Other	<u>1.9</u>	<u>2.8</u>	<u>0.0</u>	<u>2.5</u>	<u>2.0</u>
Total	12.9	14.6	12.1	12.5	12.5
Average	1.4	1.6	1.3	1.4	1.4

Note: 3 = Strong
2 = Moderate
1 = Minimal

Source: The Public Sector and Economics Research Associates



Attitudes Concerning the Area

The survey of merchants also asked for an evaluation of the RPA in terms of certain concerns. Table 19 summarizes the results of the evaluation by various merchant groups. Overall, the merchants rated the RPA "fair to poor" on four issues:

- (1) Availability of parking
- (2) Appearance
- (3) Variety of merchandise
- (4) Attitude of the merchants toward Redevelopment

In general, all types of merchants gave the highest ratings to the city services and traffic circulation.

Table 20 presents the evaluation of these same factors by merchant location. As shown, the availability of parking receives a lower rating by merchants along Junipero Serra Boulevard and lower Mission Street. Junipero Serra merchants also gave the lowest ratings to the RPA for traffic circulation.

SHOPPERS SURVEY

The shoppers survey was conducted at five major shopping districts in the area:

Mission Street	85
Junipero Serra	30
Serramonte	65
Serra Center	60
Westlake	60
Total Interviews	<u>300</u>

The interviews were conducted Friday through Tuesday to obtain a mix of weekend and weekday shoppers. The results of the shoppers survey have been written up in detail in a separate report prepared for the Daly City Redevelopment Agency by The Public Sector. This section of the report presents an overview of the significant findings of the survey.

Table 19

ATTITUDES CONCERNING PROJECT AREA
BY MERCHANT LOCATION

<u>How do you feel about?</u>	<u>Merchants Located At:</u>		
	<u>Lower Mission</u>	<u>Upper Mission</u>	<u>Junipero Serra</u>
Availability of Parking	1.7	2.0	1.7
Traffic Circulation	2.2	2.5	2.0
Appearance	1.9	1.9	1.8
City Services	2.3	2.4	2.4
Variety of Merchandise	1.8	1.9	1.8
Convenience to Market	2.1	2.3	2.5
Attitude of other Merchants	1.6	1.6	1.7

Note: 4 = Excellent
 3 = Good
 2 = Fair
 1 = Poor
 0 = No Comment

Source: The Public Sector and Economics Research Associates

Table 20

ATTITUDES CONCERNING PROJECT AREA
BY MERCHANT TYPE

How do you feel about?	Evaluation Factor				
	All Respondents	Trade	Food/ Beverage	Auto	Services
Availability of Parking	1.8	1.6	2.1	2.0	1.8
Traffic Circulation	2.3	2.4	1.8	2.6	2.1
Appearance	1.8	1.8	2.0	2.0	1.6
City Services	2.4	2.4	2.5	2.6	2.1
Variety of Merchandise	1.8	1.8	2.0	1.9	1.6
Convenience to Market	1.9	2.2	3.0	2.2	2.3
Attitude of Other Merchants	1.5	1.5	0.9	1.4	1.5

Note: 4 = Excellent
 3 = Good
 2 = Fair
 1 = Poor
 0 = No Comment

Source: The Public Sector; and Economics Research Associates

Characteristics of Shoppers

Table 21 summarizes the socio-economic characteristics of the 300 shoppers interviewed. In general, the characteristics are similar to those of the households surveyed in the primary trade area. The median age of all shoppers was 37.5 years. Westlake, because of its location in an older established neighborhood, had the largest percent of shoppers over 65, -16 percent versus the 11 percent for all locations. It is significant to note that Mission Street reported the highest proportion of shoppers aged 18 to 24. Along Mission Street this group represents 22 percent of shoppers compared to only 19 percent for all locations combined.

The statistics on family income of shoppers show even wider differences among shopping areas. The median income of all shoppers is \$12,816. However, for shoppers interviewed along Mission Street, the median was only \$9000. To some extent, this low figure reflects the higher proportion of young shoppers, including students along Mission Street.

The proportion of male and female shoppers also shows some marked differences from location to location. Among all shoppers, males represented only 35 percent of the total. However, along Mission Street, males represented 60 percent of the total, and along Junipero Serra, they were 53 percent of the total. To some extent, this reflects the types of stores in the area, but it may also reflect consumer attitudes and impressions of the area.

Shopping Patterns

The origins of shoppers at each location, awareness levels and frequency of shopping are all important factors used to define the primary trade area in the next section of this report. This section presents the basic data on these shopping patterns. All shoppers interviewed were asked their zip codes to locate their area of residence. Among the total

Table 21

CHARACTERISTICS OF SHOPPERS AT EACH AREA

Characteristic	Percent Distribution For Shoppers At:					All Respon- dents
	Mission Street	Junipero Serra	West- Lake	Serra- monte	Serra	
<u>Age</u>						
65 and over	14%	10%	16%	10%	8%	11%
55-64	10	13	11	10	8	11
45-54	14	19	19	17	18	16
35-44	14	25	16	16	17	16
25-34	26	22	22	28	33	27
18-24	22	12	16	19	18	19
Median	36.4	40.4	37.5	35.8	34.0	37.5
<u>Income</u>						
Under \$6,000	22%	15%	16%	13%	10%	14%
\$6,000-8,999	26	12	9	14	13	14
\$9,000-11,999	16	12	14	14	13	13
\$12,000-14,999	17	27	23	23	28	22
\$15,000-19,999	8	16	16	17	19	16
\$20,000-29,999	5	14	15	13	13	13
Over \$30,000	2	1	2	3	2	3
Don't Know	5	4	5	4	2	5
Median	\$9,000	\$12,888	\$13,041	\$12,780	\$13,176	\$12,816
<u>Sex</u>						
Male	60%	53%	45%	43%	35%	45%
Female	40	47	55	57	65	56

Source: The Public Sector and Economics Research Associates

of all shoppers, the following locations were identified.

<u>Area</u>	<u>Percent</u>
A - Daly City, Colma, Lower San Francisco	41% 20
B - All other San Francisco	17
C - Pacifica, South San Francisco, San Bruno	14
All other	8 <u>100%</u>

Areas A, B and C are identified in Figure E. To further clarify the relationship of shoppers residence and place of shopping, additional analyses were performed on the survey data. The results of this analysis are summarized in Table 22.

Rather than analyze the origins of all shoppers, ERA examined two special groups, (1) shoppers who do shop in the RPA, and (2) shoppers who were actually interviewed in the RPA. As shown in the table, in each of these categories, the largest share of shoppers reside in Daly City. Junipero Serra shoppers were more evenly distributed between east and west Daly City. It is important to note that in each category, the 94112 zip code area of San Francisco was the next most common residence reported.

Shoppers were also asked how frequently they shop at various locations. The results are shown in Table 23. Mission Street and Junipero Serra were most frequently mentioned as places where they never shop. As reported in the household survey, the shoppers indicated that they shop most frequently at Serramonte.

Attitudes Concerning the Area

As with the household and merchant survey, the survey of shoppers asked for attitudes toward and suggestions for the RPA.



KEY

- A - Daly City
 - Colma
 - Lower San Francisco
- B - All other San Francisco
- C - Pacific
 - South San Francisco
 - San Bruno

RESIDENT ZIP CODE LOCATIONS OF DALY CITY SHOPPERS



SCALE



Table 22

RESIDENCE OF PROJECT AREA SHOPPER

<u>Residence</u>	<u>Zip</u>	Percent of Respondents:			
		<u>Answering "Do Shop"</u>		<u>Interviewed At:</u>	
		<u>Mission Street</u>	<u>Junipero Serra</u>	<u>Mission Street</u>	<u>Junipero Serra</u>
Daly City - East	94014	35%	29%	48%	7%
Daly City - West	94015	14	28	6	16
San Francisco	94112	9	9	6	13
Pacifica	94044	2	7	2	16
San Francisco	94134	4	3	1	7
San Francisco	94124	0	0	0	7
San Francisco	94110	6	2	7	3
All Other Areas		30	22	30	31
Total		100%	100%	100%	100%

Source: The Public Sector and Economics Research Associates

Table 23
FREQUENCY OF SHOPPING BY
SHOPPERS SURVEYED

	Once or More <u>Per week</u> 18 ⁰ %	2-3 Times <u>Per Mo.</u> 4 ⁰ %	Infreq - uently <u>15⁰%</u>	<u>Never</u> 63 ⁰ %
Mission Street				
Junipero Serra	5	4	20	71
Serra Center	15	12	25	48
Serramonte	39	24	26	1
Westlake	19	9	26	46
Stonestown	16	10	32	42
Downtown San Francisco	12	10	34	44

Source: The Public Sector and Economics Research Associates

First shoppers were asked to agree or disagree with specific statements concerning the project area. Then they were asked to give opinions and suggestions for the area.

Table 24 presents the results of the evaluation by those shoppers who are familiar with RPA. The largest percent of these shoppers agreed with the statement that the merchants and sales persons in the area are friendly. A significantly greater percent of these shoppers agree that Junipero Serra is convenient and a pleasant environment.

Table 25 summarizes the results of the evaluation of each of the shopping areas where interviews were conducted. In Table 25, the evaluation of each shopping location is based upon only those shoppers who actually were interviewed there. Again, on this basis, most shoppers agree that the people in the RPA are friendly toward shoppers. However, on this comparative basis, it can be seen that the RPA received a lower percent of agreement on these factors than any of the other three shopping areas.

Table 26 summarizes the suggestions of shoppers for the RPA. However, to better evaluate these suggestions, Table 27, analyzes the results for just those shoppers who actually shop in the area. On this basis, it can be seen that the most frequent suggestions were: provide small stores for convenience shopping; provide services; and provide a wider variety of stores and merchandise. More specifically, the types of stores suggested are shown below:

Small stores (variety)

Dime store	Sports
Shoes	Hobby
Fabric	Head shop
Hardware	Cycle
Liquor	Boutique

Table 24

REACTION TO RPA BY
SHOPPERS FAMILIAR WITH
THE AREA

<u>Statement</u>	<u>Percent who Agree:</u>	
	<u>Mission Street</u>	<u>Junipero Serra</u>
Available Parking	5%	17%
Convenience	14	28
Pleasant Environment	11	25
Friendly People	19	33
Variety of Merchandise	13	19
Fun	10	17
Percent familiar with:	66	46

Source: The Public Sector and Economics Research Associates

Table 25

REACTION TO SHOPPING AREA WHERE INTERVIEWED

<u>This Term Applies Here</u>	<u>Percent at Each Location Who Agree</u>				
	<u>Mission Street</u>	<u>Junipero Serra</u>	<u>West- Lake</u>	<u>Serra- monte</u>	<u>Serra</u>
Available Parking	54%	71%	95%	95%	61%
Convenience	81	71	92	92	92
Pleasant Environment	61	68	87	95	88
Friendly People	83	97	93	92	86
Variety of Merchandise	64	61	62	92	83
Fun	58	48	53	86	55

Source: The Public Sector and Economics Research Associates

Table 26

HOW TO IMPROVE THE PROJECT AREA
ACCORDING TO SHOPPERS SURVEYED

<u>Suggestions:</u>	<u>Percent who made the Suggestion regarding:</u>	
	<u>Mission Street</u>	<u>Junipero Serra</u>
Service	19%	13%
Variety of Merchandise	6	8
Large Stores	5	3
Small Stores/Variety	9	3
Food Markets	4	-
Mall	4	2
Amenities	4	-
Like as it is	4	2
All Messed Up	-	2
Food		
Other	6	6
Don't Know	<u>39</u>	<u>61</u>
	100%	100%

Source: The Public Sector and Economics Research Associates

Table 27

HOW TO IMPROVE PROJECT AREA ACCORDING TO
THOSE WHO SHOP IN THE PROJECT AREA

<u>Suggestion</u>	Percent who made the <u>Suggestion regarding:</u>	
	<u>Mission Street</u>	<u>Junipero Serra</u>
Mall	7.8%	3.2%
Like as is	7.8	3.2
Large Stores	6.1	7.4
Food Markets	7.0	1.1
Small Stores/Variety	18.3	4.3
Services	18.3	22.3
Amenities	7.0	4.3
Restaurants	.0	3.2
More Variety of Merchandise	12.2	12.8
Inexpensive Merchandise	.9	1.1
Don't Like	1.7	.0
Too Many Centers Now	.0	.0
All Messed Up	2.6	3.2

Source: The Public Sector and Economics Research Associates

Services

- Laundry/cleaners
- Entertainment for children
- Parking (more)
- Library
- Extend BART time
- Restaurants

Of course, the potentials for the RPA should not be restricted to these uses. The sample of shoppers is biased towards those who shop there now. It will be important, in subsequent planning to retain these shoppers, while attracting new markets to strengthen the RPA. However, this survey of shoppers, as well as the other two surveys, provide useful guidelines for the planning process.

Section V

MARKET SUPPORT FOR RETAIL SPACE

This section first defines the primary trade area for the RPA. Then based on an analysis of spending patterns in the trade area, total market potential is estimated. By comparing this to historical sales trends in the RPA, a market index is developed to measure the "drawing power" and "sales leakage" of the area. Finally, future sales are projected for a variety of merchandise categories, and these are used to estimate future retail space needs in the RPA.

THE PRIMARY TRADE AREA

The definition of a primary trade area is never exact. In general a primary trade area should have three characteristics:

- (1) It should encompass a large share of the customers for a shopping district.
- (2) Changes in buying behavior in the primary trade area should be reflected in the shopping district.
- (3) Changes in buying behavior outside of the primary trade area should be correlated with changes within the primary trade area.

The definition of a primary trade area for the RPA, was based largely on the data collected in the survey of shoppers, households, and merchants, as discussed earlier. The shoppers from each trade area were evaluated based on four primary considerations:

- (1) The percent who do shop at Mission Street.
- (2) The percent who do shop at Junipero Serra.

(3) The percent actually interviewed at Mission Street.

(4) The percent actually interviewed at Junipero Serra.

Only those zip code areas which scored high on each of these points were included in the primary trade area. These zip code areas are:

94112	South Central San Francisco
94014	Daly City - East
94015	Daly City - West

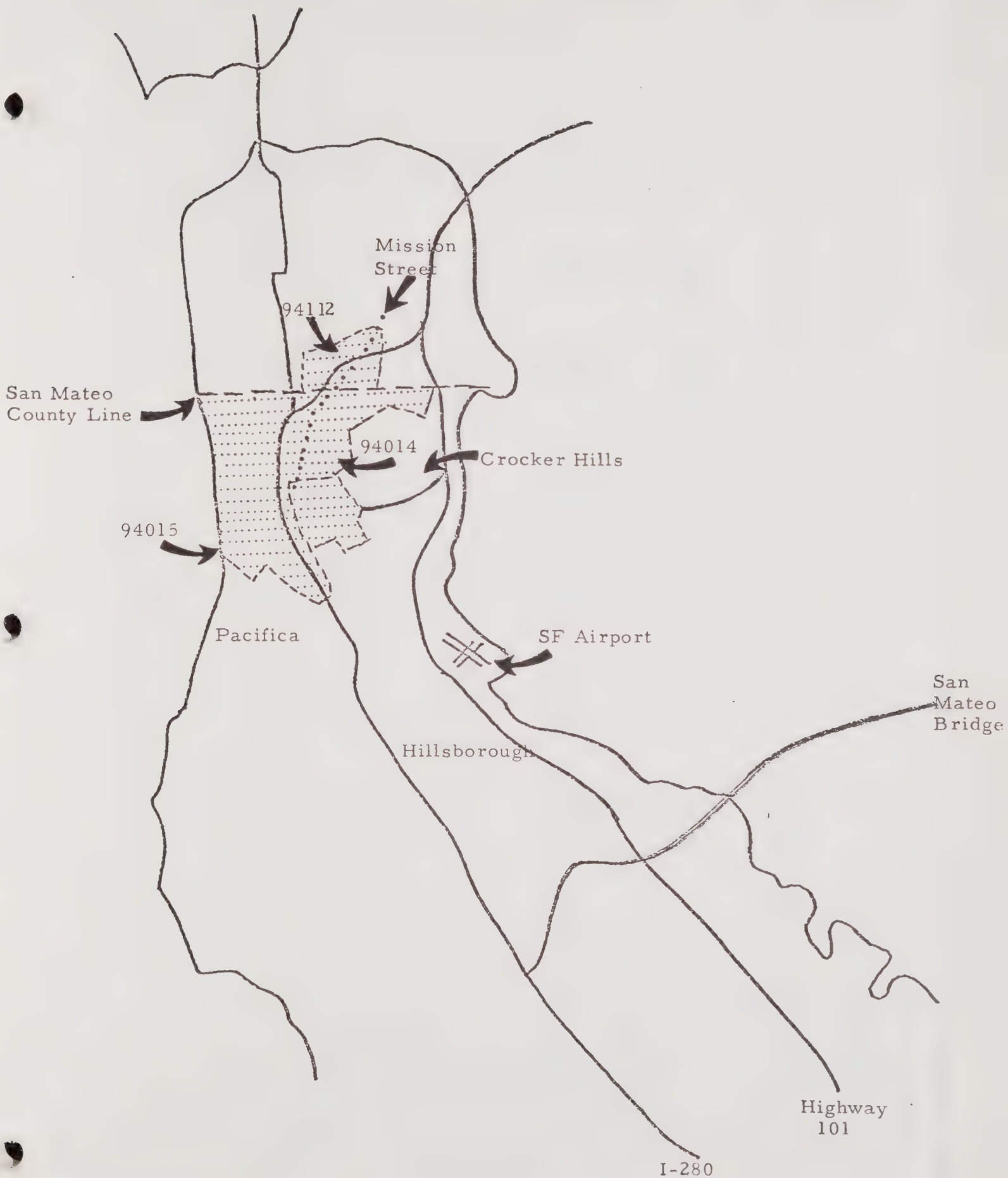
These areas are designated on the map in Figure F. Two other zip code areas scored high on some of the points but not all. For example, a fairly large share of shoppers along Junipero Serra live in Pacifica, but only a very small percent of Mission Street shoppers do. The primary trade area, as defined above, was also confirmed by the findings of the household and merchant surveys.

CHARACTERISTICS OF PRIMARY TRADE AREA

The potential retail sales in the RPA depend directly on the characteristics of the residents of the primary trade area. Population growth and trends in spending patterns are the primary factors in this determination.

Population Trends

Table 28 presents population and household growth in the primary trade area, and surrounding region. In 1975, the total population in the trade area was 128,177. Of this total, Daly City represented 72,500 and South Central San Francisco 55,677. In the same year, the combined population of San Francisco and San Mateo counties was



DEFINITION OF PRIMARY TRADE AREA

Figure F

Table 28

POPULATION AND HOUSEHOLD GROWTH
TRENDS IN THE PRIMARY TRADE AREA
AND SURROUNDING REGION
1970 - 1985

Population	1970	1973	1975	1980	1985	Average Growth	Annual Rate
						1970- 1975	1975- 1985 ^{4/}
Primary Market							
Daly City	66,922	70,268	72,500	75,037	77,575	1.6%	0.7%
San Francisco (South Central ^{1/})	58,607	56,848	55,677	54,841	54,006	-1.0%	-0.3%
Subtotal	125,529	127,116	128,177	129,878	131,581	0.4%	0.5%
San Francisco (other portion)	655,693	631,891	616,023	606,259	599,494	-1.0%	-0.3%
San Mateo County ^{2/}	490,478	495,891	499,500	518,063	538,725	0.3%	0.7%
Total	1,271,700	1,254,898	1,243,700	1,254,200	1,269,800	-0.4%	0.2%
Households ^{3/}							
Primary Market							
Daly City	22,307	23,922	25,000	26,798	28,731	2.4%	2.9%
San Francisco (South Central)	19,535	19,332	19,198	19,586	20,002	-0.3%	0.8%
Subtotal	41,843	43,254	44,198	43,384	48,733	1.1%	1.0%
San Francisco (other portion)	270,947	264,994	261,026	263,590	262,935	0.7%	0.0%
San Mateo County	163,492	168,741	172,241	185,022	199,527	1.0%	1.5%
Total	476,282	476,989	477,465	491,996	511,195	0.0%	0.7%

^{1/} Based on population in the ten census tracts composing zip code area 94112. Projected at one percent decline per annum experienced between 1970 and 1975 in San Francisco.

^{2/} Excluding Daly City.

^{3/} Assumes average household size of 3.0, 2.9, 2.8, 2.7 in 1970, 1975, 1980, 1985, except for San Francisco (other portions where 2.42, 2.36, 2.30, and 2.28 are used.

^{4/} Based on estimated by State Department of Finance.

Source: As noted and Economics Research Associates

1.24 million.

During the 1970 - 1975 period, Daly City's population increased at 1.6 percent per annum and San Francisco's declined at 1 percent per annum. Thus the total trade area population increased at 0.4 percent per annum. According to the State Department of Finance, Daly City's population is projected to increase at a slower rate, 0.7 percent, during the 1975 - 1985 period. San Francisco's population will not decline so rapidly as in the recent past. The combined effect is a projected population growth of only 0.5 percent per annum through 1985.

The number of households in the primary trade area will be increasing at a slightly faster rate, approximately 1.0 percent per annum. This is because the average household size will decline as more young people leave home early, more single people set up households, and birth rates decline.

Spending Patterns

Table 29 presents data from the State Board of Equalization concerning per capita sales in various merchandise categories. All of the figures are stated in current dollars. The annual change in dollar purchases over the 1973 - 1975 period are also shown. Based on this trend, ERA has projected per capita sales for 1980 and 1985. As shown per capita sales of apparel, general merchandise and specialty goods will reach \$776 by 1985. Similarly, per capita sales of groceries and drugs will reach \$337.

Based on per capita sales and population projections, Table 30 projects total purchases by residents of the primary trade area for 1980 and 1985. Expenditures on apparel, general merchandise, and specialty items will reach \$102 million by 1985. Total purchases on these items will reach over \$319 million by 1985.

Table 29
PER CAPITA SALES IN PRIMARY TRADE AREA
1973-1985

<u>Merchant Group</u>	<u>Per Capita Sales</u>				
	<u>1973</u>	<u>1975^{1/}</u>	<u>Annual Change</u>	<u>1980</u>	<u>1985^{2/}</u>
Apparel, General Merchandise, Specialty	\$656.04	\$676.22	\$10.09	\$726	776
T. V. /Stereo ^{3/}	20.00	21.00	1.00	23	25
Home Furnishing & Appliances	90.36	91.36	1.00	94	98
Building Materials	146.47	156.41	5.00	185	210
Groceries, Drugs	313.30	317.30	2.00	327	337
Autos-Used	17.00	15.00	-1.00	15	15
Restaurants, Bars	267.25	277.33	5.00	302	327
Auto-New	269.27	277.87	4.30	300	320
Service Station	N.A.	246.09	N.A.	250	260
Auto Supplies	35.00	39.00	2.00	49	59

^{1/} Based on actual figures for nine-county Bay Area, as reported in Taxable Sales In California, by the State Board of Equalization.

^{2/} Estimated by Economics Research Associates based on trend during 1973-1975 period.

^{3/} Estimated by Economics Research Associates

Source: As noted and Economics Research Associates

Table 30

TOTAL RETAIL PURCHASES BY PRIMARY
TRADE AREA POPULATION
1973-1985

<u>Merchant Group</u>	<u>Total Purchases (\$000)</u>			
	<u>1973</u>	<u>1975</u>	<u>1980</u>	<u>1985</u>
Apparel, General Merchandise, Specialty	\$83,395	\$86,677	\$94,291	\$102,106
T.V./Stereo	2,542	2,691	2,987	3,289
Home Furnishing & Appliances	11,486	11,711	12,208	12,895
Building Materials	18,619	20,048	24,027	27,632
Groceries, Drugs	39,826	40,671	42,470	44,342
Autos-Used	2,161	1,922	1,948	1,973
Restaurants, Bars	33,972	35,548	39,223	43,026
Auto-New	34,229	35,616	38,963	42,105
Service Station	n. a.	n. a.	32,469	34,211
Auto Supplies	<u>4,449</u>	<u>4,999</u>	<u>6,364</u>	<u>7,763</u>
Total	\$230,679	\$239,883	\$294,950	\$319,342

Source: Economics Research Associates

COMPETITIVE SHOPPING AREAS

Another important factor in projecting sales to the RPA, is the competition from other shopping areas. To the east of the RPA, Daly City has little commercial development. Residents of the city north of San Bruno Mountain rely heavily on San Francisco stores for their full shopping needs. Residents in this area use the neighborhood shops on Mission Street and Geneva Avenue in San Francisco. To the west, properties along Sullivan Avenue south of Lake Merced Golf Club function as an important neighborhood shopping district serving Broadmore.

All of these areas will continue to provide convenient neighborhood shopping to the immediately surrounding residential areas. Thus, the potential to expand the sales in the RPA depends more directly on its ability to compete with the major shopping centers in the area. To better assess this potential, ERA has surveyed the four major competing shopping centers in the area. By reviewing and assessing the surrounding competing shopping areas, ERA can better evaluate the potential to expand sales in the RPA.

Table 31 presents a summary of characteristics of the four major shopping centers surveyed in detail. Figure G. locates these and other shopping areas on a map of the area. As shown in the table, Stonestown is the largest shopping center offering direct competition to the RPA in terms of square feet. However, in terms of total sales Serramonte reported \$86 million in 1975 compared to \$55 million at Stonestown. Westlake, a smaller and older center, does approximately \$33 million in sales per year.

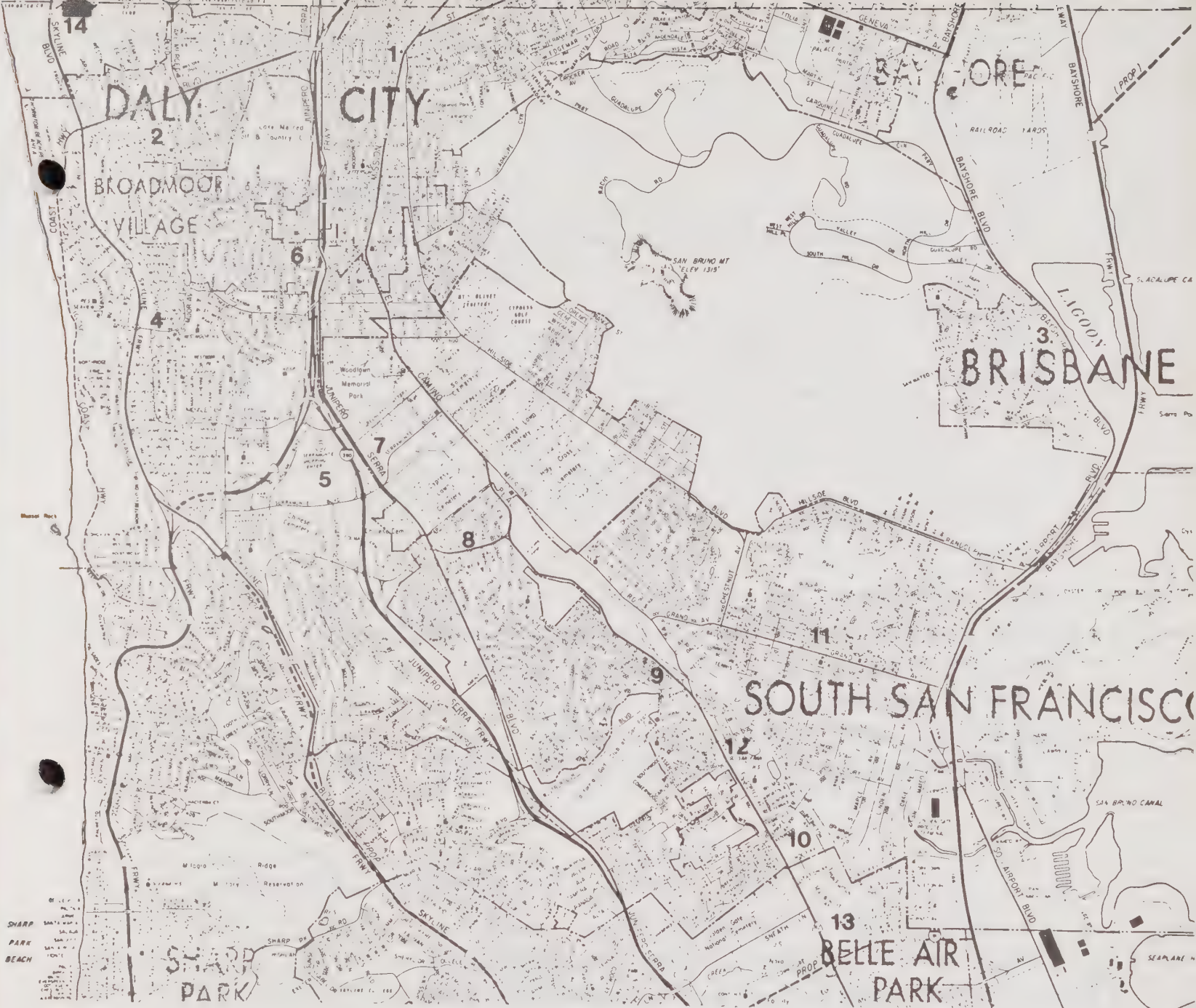
Each of these centers has its own characteristics and image. Serra Center, for instance, specializes in auto-related merchandise, and stereo and other "big ticket" items. Stonestown is better known as a "high quality" center with more expensive stores, such as Joseph

Table 31

SELECTED CHARACTERISTICS OF MAJOR COMPETITIVE SHOPPING AREAS

Name	<u>Stonestown</u>	<u>Westlake</u>	<u>Serramonte</u>	<u>Serra Center</u>
Location	San Francisco	Daly City	Daly City	Colma
Type of Center	Regional	Community	Regional	Regional
Acres of Land	42	22	73	20
Number of Stores	76	91	90	21
Building Space (Sq. Ft.)	1,100,000	600,000	852,000	211,593
Estimated Annual Sales	\$55 Million	\$33 Million	\$86 Million	\$22 Million
Number of Parking Spaces	3500	1950	5200	1000
Date Opened	July, 1952	1951	Sept. 1968	1970
Major Tenants:	Joseph Magnin Grand Auto Woolworth's Walgreen's The Emporium Roos/Atkins Hastings Quality Foods Casual Corner Grodins Topps & Trowers	Walgreen's Singer Sewing Pier I Imports Woolworth's Westlake Office Bldg. Radio Shack J.C. Penny's	Macy's Montgomery Ward's B. Dalton Books Hickory Farms Kinney's Roos/Atkins United Magnavox Topps & Trowers Mervyn's Kress Bond Clothes McDonald's	Gemco Disc. Akron Imports Standard Brand Paints Bumbleberry Restaurant Pacific Stereo Serra HiFi Durwood Theatres Home Yardage

Source: Directory of Shopping Centers, 1974, and Economics Research Associates, Field Survey of Shopping Areas, 1975.



No.	Name / Location	Type of Shopping Center
*1	Mission Street, Daly City	Downtown
*2	Westlake Shopping Center, Daly City	Community
3	Brisbane	Downtown
4	Skyline Plaza Shopping Center, Daly City	Neighborhood
*5	Serramonte Shopping Center, Daly City	Regional
6	Broadmoor Village Shopping Center, S. S. F.	Neighborhood
7	Serra Center, Colma	Regional
8	Winston Manor Shopping Center, S. S. F.	Neighborhood
9	Buri Buri Shopping Center, S. S. F.	Neighborhood
10	Brentwood Shopping Center, S. S. F.	Neighborhood
11	Grand Avenue, S. S. F.	Neighborhood
12	El Camino Real Shopping Area, S. S. F.	Neighborhood
13	Tanforan Shopping Center, San Bruno	Regional
*14	Stonestown Shopping Center, S. F.	Regional

* These centers were surveyed.

LOCATION OF RETAIL CENTERS IN THE REGION
Figure G

Magnin and the Emporium.

Three major conclusions were drawn from the survey of competing shopping centers:

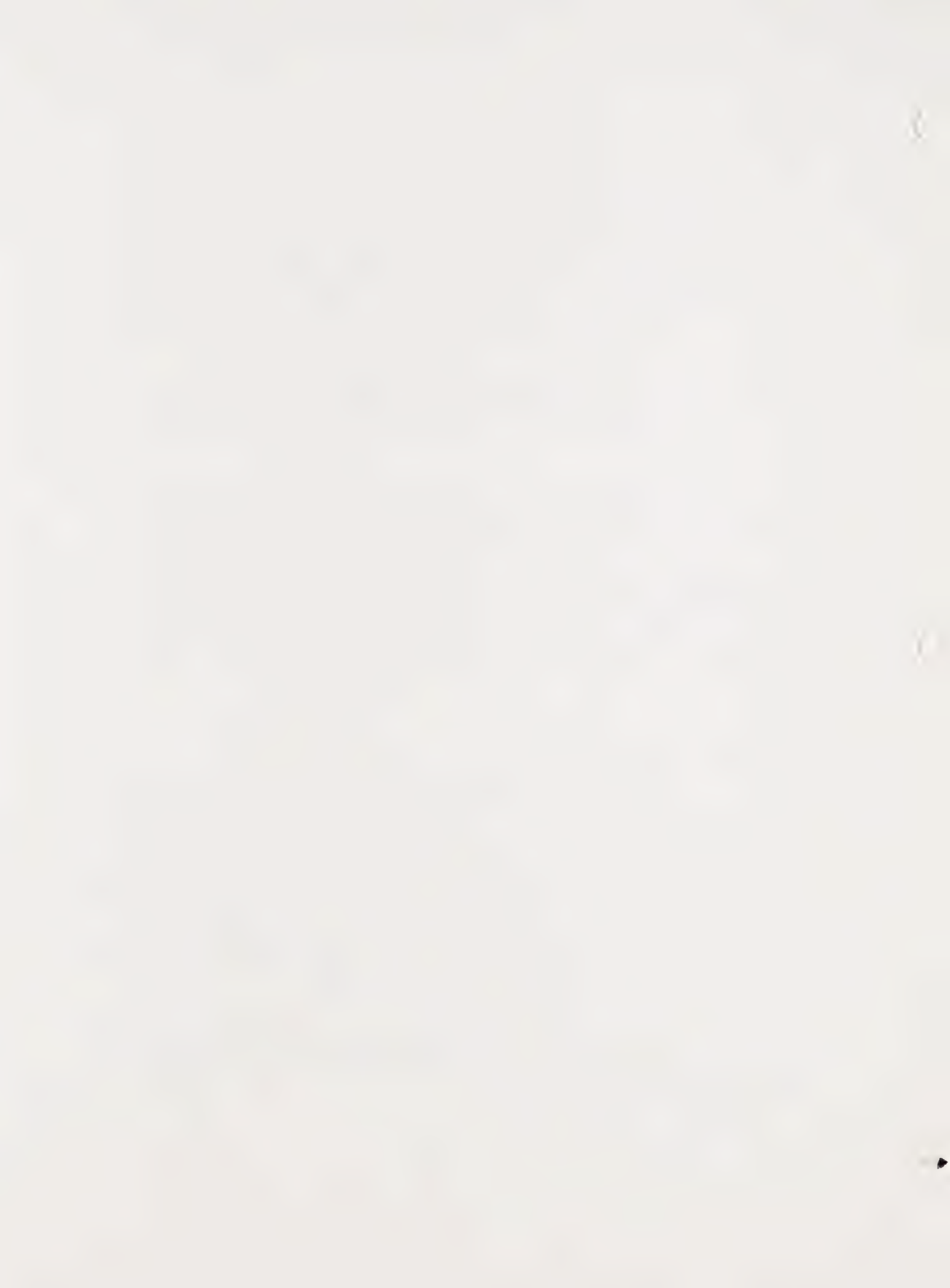
- (1) The RPA primary trade area is well served by a large number and variety of shopping areas.
- (2) Most of the major department store and apparel tenants are represented in the area, thus making it very difficult to develop this type of business in the RPA.
- (3) The shopping centers, particularly Serra Center, offers strong competition to the RPA for autos, auto-supplies, TV/stereo, and other big ticket items.

Thus without some form of redevelopment, the RPA could not expect to improve its competitive position and may very well lose its current share of the market. Thus, the RPA must strive to reinforce and expand its appeal as a shopping district without competing directly with the existing major centers, which offer a wide variety of merchandise through major department stores and a large number of apparel and specialty stores.

SALES LEVELS IN THE RPA

Current sales levels are analyzed to determine what share of total market potential is currently being captured. The State Board of Equalization provided ERA with sales data for merchants in the RPA, aggregated into major categories. In order to calculate sales per square foot over the recent past, only those outlets which had been in the same location for three years or more were included. (In addition some stores were eliminated because the State Board of Equalization could not identify them by the State reporting number.)

In every case however, the outlets for which sales figures were obtained represented a substantial proportion of the total sales in each category.



The figures reported by the State Board of Equalization for the sample of selected outlets are shown in Table 32. Table 32 also presents data on the square feet of those outlets included in each category. Thus, an estimate of sales per square foot was calculated based on the sample outlets. In two categories, apparel/general merchandise and groceries/drugs, the sales per square foot are lower than standards for these types of outlets. In two cases they are well above the standards. TV/stereo outlets would normally average about \$125 in sales per square foot. Furniture and appliance stores normally average \$40 to \$50 per square foot. All of the sales per square foot in the other categories are reasonable in light of standards. However, it should be noted that all of the sales per square foot figures are probably high because the sample contains only the most established outlets which have been in operation at least three years. Thus some of these figures are adjusted downward, when applied to the total RPA.

Table 33 estimates the total sales in the RPA in each category for 1973 and 1975. The estimated sales per square foot figures were applied to the total square feet of space represented in each category. On this basis, Table 33 estimates that total sales in the RPA were \$46.5 million in 1973 and \$49.4 million in 1975. New auto sales were the largest single category with \$16.5 million in sales in 1975. TV and stereo was the next largest category with estimated sales of \$7.9 million in 1975.

Table 33 also calculates a "market index" for each category by comparing total sales in the RPA to total sales by residents of the area. In one sense, the market index measures drawing power by comparing RPA sales to purchases by local residents. Obviously if the market index is greater than 100 percent, a merchant group is attracting more dollars from outside the trade area than it is losing from inside the trade area. At the same time, the market index helps relate primary trade area sales to sales outside this trade area. Not all of the

Table 32

TOTAL SALES AND SALES PER SQUARE FOOT
FOR SELECTED OUTLETS IN THE PROJECT AREA
1973 and 1975

Merchant Group	Selected Project Area Outlets					Performance Rating
	Sales (\$000) ^{1/}		Actual Sq. Ft. ^{2/} Outlets	Sales Per Sq. Ft.		
	1973	1975		1973	1975	
Apparel, General Merchandise, Specialty	\$1,546	\$2,555	37,810	\$ 41	\$ 68	<u>4/</u>
T. V. /Stereo	6,513	6,396	20,770	310	305 ^{3/}	High
Home Furnishing and Appliance	2,876	3,526	37,450	76	94	High
Building Materials	1,016	991	16,610	61	60	
Groceries, Drugs	1,659	1,551	42,110	39	37	Low
Autos - Used	837	1,201	53,220	16	22	
Restaurants, Bars	2,777	3,522	39,514	70	89	
Autos - New	13,972	14,206	94,090	149	151	
Auto Supplies	4,483	4,027	76,070	59	53	

^{1/} Based on data provided by State Board of Equalization.

^{2/} Based on data provided by Daly City Redevelopment Agency.

^{3/} This figure is not representative because it includes Mathews.

^{4/} The sales per square foot for this overall category is about average. However, there are quite a few stores in this category, which are low.

Source: As noted and Economics Research Associates



Table 33

THE ESTIMATED TOTAL SALES
AND MARKET INDEX FOR PROJECT AREA
1973 and 1975

<u>Merchant Group</u>	<u>Total Sq. Ft.</u>	Estimated Total Sales (\$000)		Market Index ^{1/}	
		<u>1973</u>	<u>1975</u>	<u>1973</u>	<u>1975</u>
Apparel, General Merchandise, Specialty	59,575	\$2,442	\$4,026	3%	5%
T. V. /Stereo ^{2/}	40,430	8,100	7,900	318	293
Home Furnishings and Appliances	49,420	3,470	4,246	30	36
Building Materials	68,368	4,170	4,078	22	20
Groceries, Drugs	57,528	2,243	2,118	6	5
Autos - Used	93,530	1,496	2,113	69	109
Restaurants, Bars	39,514	2,777	3,522	8	10
Autos - New ^{3/}	150,050	16,550	16,550	42	46
Auto Supplies ^{3/}	<u>109,270</u>	<u>5,313</u>	<u>4,857</u>	<u>119</u>	<u>97</u>
Total/Average	667,685	\$46,561	\$49,410	20%	20%

1/ Total sales in the project area as a percent of total purchases by residents of primary trade area.

2/ Assumes sales per square foot of \$80 for those stores not in the sample.

3/ Assumes \$110 per square foot for auto and \$50 per square foot for auto supplies.

Source: Economics Research Associates

sales in the RPA come from the primary trade area. However, because of the definition of the trade area, sales to residents outside the area will probably change in direct proportion to sales to residents of the primary trade area.

Thus, the market index of 293 for TV/stereo in 1975 indicates this category is drawing from a much wider area than the primary trade area. On the other hand, the market index of 5 for groceries/drugs in 1975 results because this category is not only competing with stores outside of the trade area but also other shopping areas inside of the trade area. That is, in some categories, there is no expectation that the RPA will ever achieve a market index above 20 or 30.

SUPPORT FROM ON-SITE GROUPS

The Daly City Redevelopment Project has the opportunity to reinforce its redevelopment efforts by attracting a larger share of total sales from certain groups who will spend more time in the RPA. The proximity to the BART station has already been recognized as a potential asset. In addition, a redevelopment project of this type has the opportunity to develop mutually reinforcing uses in the area to improve the overall performance of the project area. In subsequent sections of this report, there are recommendations concerning the development of new office buildings and multiple-family dwelling units in the project. Such proposals could result in up to 1,000 new office employees in the RPA by 1985 and up to 1,200 new residents by 1985. While this represents only about 1 percent of the trade area, they are likely to spend several times more than the average in the RPA for certain items, particularly convenience type goods. Thus, these groups as well as the BART riders represent an opportunity to reinforce the plans for redevelopment.

In the opinion of ERA, and based on discussions with BART

officials, the Daly City BART station is one of the best locations along the BART line for commercial development. This is so partly because of its physical attributes, partly because every train which comes across the bay continues on to Daly City, and also because of the possibility of extending the BART south and to San Francisco International Airport. (Other factors are discussed in the section on office development.)

The area around the Daly City BART station has the potential to become a new focal point of employment, transportation, and pedestrian activity in the North County area. It is therefore a prime retail location which can provide significant support for commercial facilities. At this preliminary stage of planning we did not quantify the dollar sales volume represented by the BART riders, and on-site groups. However, the potentials represented should be of major importance in a number of ways, during the planning process.

- (1) The location and design of new development should allow for optimal use by these groups.
- (2) The specific types of merchandise offered should account for the potential support of these groups.
- (3) The opportunities to develop other types of activities on-site should account for these groups.
- (4) Plans for future expansion of the redevelopment program should recognize the potentials of these groups.

Because of these factors, from the early stages of the planning, the consultant team has visualized a major multi-use complex in the vicinity of the BART station, and extending south along Junipero Serra Boulevard. Such a complex may contain office space, retail and entertainment facilities, and high density housing. Such a complex would serve BART passengers, on-site residents, and residents in the local area, alike. It could also extend the active hours of the RPA into the evening and weekends, and attract

larger numbers of shoppers from throughout the primary trade area.

It is not, however, anticipated that the complex will become a major regional shopping center featuring several large department stores. The limited size of the site, the capacity of local streets, and the sizable parking requirements do not make such a development desirable. Also, existing competitive retail centers tend to limit the potential support for such a center in the RPA.

Likewise the support from BART riders, and on-site groups, and the potential for a multi-use complex suggest some of the types of retail space which may be required. For example, new shoppers goods space - apparel, accessories, specialty items - might best be located in the multi-use complex. And certainly the office employees, residents, and BART passengers would support some additional convenience goods space in the complex - groceries, drugs, liquor. In addition, some of the new restaurants, cocktail lounges and fast food establishments planned for the RPA should be located near the BART station.

The implication of the proximity to BART, as well as on-site groups, and the opportunity for a multi-use complex, has been a major consideration in forecasting future market indices and total sales for the RPA. The more of this potential support which is captured, the closer the RPA will come to the maximum projected sales figures.

PROJECTED SALES FOR THE RPA

Sales in the RPA are projected by estimating the future market index for each merchant group. In estimating future changes in the market indices, the following considerations were of major importance:

- (1) Recent trends in the market index.
- (2) Competition from other shopping districts in the area.

- (3) The characteristics - strengths and weaknesses-of the RPA.
- (4) The potentials for capturing a share of purchases by BART riders, as well as other on-site groups, - new office employees and new residents in the RPA.

All of these factors have been previously discussed. This subsection outlines the specific expectations for future sales potentials in each merchant group. Table 34 presents the minimum to maximum range of market indices which may occur under various conditions. Even the minimum projections assume some redevelopment effort in the RPA. However, the extent of redevelopment is only one of the considerations in these projections. (The effects of "no redevelopment" in the RPA are discussed in more detail below.)

Projected Market Indices

The primary consideration in estimating future market potentials for various merchant groups are outlined below:

Apparel, General Merchandise, Specialty:

- Difficult to compete with established shopping centers.
- San Francisco particularly strong in this area.
- Redevelopment should help, particularly for potentials near BART.
- INDEX PROJECTION: Increase from current index of 4 to 5-6.

TV/Stereo and Furnishings/Appliances:

- Have done very well already; therefore will be difficult to increase dramatically.
- More outlets and variety could reinforce each other.
- Largely dependent on redevelopment efforts.
(Better parking, traffic circulation, development of new sites)

Table 34
PROJECTED MARKET INDEX BY MERCHANT
GROUP IN THE PROJECT AREA
1980 and 1985

Merchant Group	1973-1975 Average	Projected Market Index ^{1/}			
		Minimum		Maximum	
		1980	1985	1980	1985
Apparel, General Merchandise, Specialty	4%	5%	5%	6%	6%
T. V. /Stereo	305	300	300	350	350
Home Furnishing and Appliances	33	35	35	40	45
Building Materials	21	20	20	20	20
Groceries, Drugs	5	5	5	6	8
Autos - Used	90	100	100	100	100
Restaurants, Bars	9	10	10	12	12
Autos - New	44	45	45	50	50
Auto Supplies	108	100	100	100	100

^{1/} Adjusted to reflect potential from special segments, such as new residents on-site, and BART riders.

Source: Economics Research Associates

- INDEX PROJECTION: TV/Stereo - Increase from 305 to the 300-350 range; Furnishings/Appliances - Increase from 33 to the 35-45 range.

Building Materials:

- Redevelopment should not affect market.
- Redevelopment plans may recommend relocation of this category and replace with multi-use complex.
- INDEX PROJECTION: Remain at current level of 20. If this category remains in RPA.

Groceries/Drugs:

- Little opportunities to increase market penetration.
- BART and on-site groups represent some additional support (if multi-use complex is constructed.)
- INDEX PROJECTION: Slight increase from 5 to the 6-8 range. (Based largely on support from the proposed new complex.)

Autos-New:

- Very successful to date.
- Major Auto-center is possible.
- Little chance to attract new dealers.
- Strong local competition (Serra Center/San Francisco.)
- INDEX PROJECTION: Slight increase from 44 to the 45-50 range.

Autos - Used:

- Increase in new autos index and planned auto center.
- INDEX PROJECTION: Slight increase from 90 to 100.

Auto Supplies:

- Recent trend to decline in index.
- Redevelopment may hinder expansion.
- INDEX PROJECTION: Slight decline from 108 to the 100 level.

Restaurants/Bars:

- Competition from San Francisco.
- New support from BART; on-site groups.
- Reinforced by "big ticket items" and other new outlets.
- INDEX PROJECTION: Increase from 5 to the 5-8 range.

Projected Sales

By applying the projected market indices to the projected total purchases by residents of the primary trade area (see Table 30), total sales in the RPA can be projected. Table 35 presents the range of projected sales in each category for the RPA, for 1980 and 1985. As shown, for example, TV/Stereo sales are projected to reach between \$8.4 and 10.4 million by 1980 and between \$9.9 and \$11.5 million by 1985. Total RPA sales are projected to reach between \$54.1 and \$60.8 by 1980; and between 60.1 and \$68.4 by 1985. It is important to recognize that these increases result from the compound effects of increases in a number of factors - population, income, expenditures, market indices, etc.

The magnitude of these numbers are better understood by looking at the increases in sales which are projected. These figures are presented in Table 36. As shown, for example TV/Stereo sales could increase by \$1.9 million to \$3.6 million by 1985. Total RPA sales could increase by \$10.8 to \$19.1 million by 1985.

Table 37 presents these dollars increases in terms of percentage

Table 35

PROJECTED SALES BY MERCHANT GROUP
1980 - 1985

<u>Merchant Group</u>	<u>Project Area Sales (\$000)</u>			
	<u>Minimum</u>		<u>Maximum</u>	
	<u>1980</u>	<u>1985</u>	<u>1980</u>	<u>1985</u>
Apparel, General Merchandise, Specialty	4,714	5,105	5,657	6,126
T. V. /Stereo	8,461	9,867	10,454	11,511
Home Furnishing and Appliances	4,272	4,513	4,883	5,802
Building Materials	4,805	5,526	4,805	5,526
Groceries, Drugs	2,123	2,660	2,548	3,547
Autos - Used	1,948	1,973	1,948	1,973
Restaurants, Bars	3,922	4,302	4,706	5,163
Autos - News	17,533	18,447	19,481	21,052
Auto Supplies	<u>6,364</u>	<u>7,763</u>	<u>6,364</u>	<u>7,763</u>
Total	\$54,142	\$60,156	\$60,846	\$68,463

Source: Economics Research Associates

Table 36

RANGE OF INCREASES IN PROJECT AREA SALES
1975 - 1985

Merchant Group	Current	Projected Increases (Dollars 000) ^{1/}			
	Sales (000\$)	Minimum		Maximum	
	1975	1980	1985	1980	1985
Apparel, General Merchandise, Specialty	\$4026	\$688	\$1079	\$1631	\$2100
T. V./Stereo	7900	561	1967	2554	3611
Home Furnishing & Appliances	4246	26	267	637	1556
Building Materials	4078	727	1448	727	1448
Groceries, Drugs	2118	5	542	430	1429
Autos - Used	2113	-165	-140	-165	-140
Restaurants, Bars	3522	400	780	1184	1641
Autos - News	16,550	983	1897	2931	4052
Auto Supplies	<u>4857</u>	<u>1507</u>	<u>2906</u>	<u>1507</u>	<u>2906</u>
Total	\$49,410	\$4,732	\$10,746	\$11,436	\$19,053

1/ Without Crocker Hills

Source: Economics Research Associates

increase over current sales levels. For example, TV/stereo sales are projected to increase from 25 to 46 percent over current levels by 1985. Total RPA sales are projected to increase from 21 to 38 percent over current levels by 1985, if redevelopment plans proceed.

None of these figures include sales potentials to residents of the proposed Crocker Hills housing development. Because of the proximity of this proposed development, the consultants analyzed its potential impacts on the redevelopment program. The exact form of the development is uncertain at this time. However, based on recent decisions by the San Mateo County Board of Supervisors and in-depth discussion with the developer (Visitacion Associates) ERA concluded the most likely development in this area would include up to 1400 dwelling units (3,000 people) in the Northeast Ridge area by 1980.

Table 38 summarizes the impact such a development could have on the RPA. First total purchases by these residents are estimated, then the amount which might occur in the RPA is estimated. On this basis, total new sales in the RPA probably would not be greater than \$1.1 million by 1985. This level of sales would represent only between 1 and 3 percent increases over the projected sales levels without Crocker Hills. ERA concludes that Crocker Hills could be a slight positive factor to the RPA in terms of sales. In addition Crocker Hills could improve the overall image of the area. But in the event that no development takes place, there will be no significant negative effects on the Daly City Redevelopment Project area.

Cost of "No Action"

It is important to note that the range of projected sales increases is based on the assumption that the redevelopment program will proceed as planned. That is, if "no action" is taken, even the minimum projection will not be achieved. In ERA's opinion, and based upon our

Table 37

RANGE OF PERCENT INCREASES IN PROJECT AREA SALES
1975 - 1985

<u>Merchant Group</u>	<u>Projected Increases (Percents) ^{1/}</u>			
	<u>Minimum</u>		<u>Maximum</u>	
	<u>1980</u>	<u>1985</u>	<u>1980</u>	<u>1985</u>
Apparel, General Merchandise, Specialty	17%	27%	41%	52%
T. V. /Stereo	7	25	32	46
Home Furnishing & Appliances	1	6	15	37
Building Materials	18	36	18	36
Groceries, Drugs	-	25	20	67
Autos - Used	-8	-7	-8	-7
Restaurants, Bars	11	22	34	47
Auto - News	6	11	18	27
Auto Supplies	<u>31</u>	<u>60</u>	<u>31</u>	<u>60</u>
Average	10%	21%	23%	38%

^{1/} Without Crocker Hills

Source: Economics Research Associates

Table 38

POTENTIAL SALES TO RESIDENTS OF
CROCKER HILLS
1980 - 1985

Merchant Group	Total Purchases By Residents ^{1/} (\$000)		Percentage Project Area ^{2/}		Total Sales In Project Area (\$000)		Percent Increase Over Sales Without Crocker Hills ^{3/}	
	1980	1985	1980	1985	1980	1985	1980	1985
Apparel, General Merchandise, Specialty	\$2,178	\$2,328	6%	6%	\$130	\$140	2%	2%
T. V. /Stereo	69	75	50	50	34	38	-	-
Home Furnishing and Appliances	282	294	50	50	141	147	3	-
Building Materials	555	630	20	20	111	126	2	2
Groceries, Drugs	981	1,011	5	5	49	50	2	1
Autos - Used	45	45	50	50	23	23	1	1
Restaurants, Bars	906	981	15	15	135	147	3	3
Autos - New	900	960	40	40	360	384	2	2
Auto Supplies	147	177	40	40	58	70	1	1
Total	\$6,063	\$6,501			\$1,041	\$1,125		

^{1/} Assumes same per capita sales as other residents in primary trade area and population of 3,000 by 1980 in the Northeast Ridge area of the development.

^{2/} Same as market index, except where market index indicates a large inflow from outside of the trade area.

^{3/} Uses figures under "Improve" conditions.

Source: Economics Research Associates

detailed analysis of the area, if no action is taken it will be difficult to maintain existing market indices. A more likely outcome would be a gradual erosion of the RPA market index, as other shopping districts gain in identity and shopper loyalty.

If this is the case, the cost of doing nothing is approximately equal to the potential sales increase which would not occur. As shown in Table 36, these increases represent between \$10.7 and \$19.0 million, depending on the extent of redevelopment which could have been undertaken and achieved.

Projected Space Needs

The projected total RPA sales are connected to projected space needs based on reasonable sales per square foot standards. This calculation is presented in Table 39. The standards used assume that many small, independent outlets will remain in the area. At the same time, some of the marginal (low sales-per-square foot) operations will be phased out, as more productive uses are planned for the area. Thus the sales per square foot standards shown in Table 39 represent target averages for the RPA, not standards as would be expected for new outlets.

As shown in Table 39, total new space needs in the RPA are expected to reach 668,000 to 732,000 square feet by 1980 and increase to the 745,000 to 837,000 square feet range by 1985. Crocker Hills could support another 12,000 to 16,000 square feet in the RPA.

Based on the total space requirements, Table 40 calculates the new space required in the RPA, that is the space requirements over and above existing space. It is important to note that Table 40 assumes that all of the existing retail space in the RPA meets acceptable standards of condition and will not need to be replaced for ten years. Thus all of the figures in Table 40 represent space needs over and above,

Table 39

PROJECTED TOTAL RETAIL SPACE
REQUIRED IN THE PROJECT AREA
1980 - 1985

<u>Merchant Group</u>	<u>Sales Per Sq. Ft.</u>	<u>Square Feet (thousands)</u>					
		<u>Without Crocker Hills</u>				<u>Due to</u>	
		<u>Minimum</u>		<u>Maximum</u>		<u>Crocker Hills</u>	
		<u>1980</u>	<u>1985</u>	<u>1980</u>	<u>1985</u>	<u>1980</u>	<u>1985</u>
Apparel, General Merchandise, Specialty	\$ 85	55	60	66	72	1.5	1.5
T. V. /Stereo	195	45	50	53	59	0.1	0.1
Home Furnishings and Appliances	85	50	53	57	68	1.7	1.7
Building Materials	80	60	69	60	69	1.4	1.6
Groceries, Drugs	40	53	66	64	89	1.2	1.3
Autos - Used	20	97	98	97	98	1.1	1.1
Restaurants, Bars	90	43	48	52	57	1.5	1.6
Autos - New	110	159	172	177	191	3.2	3.5
Auto Supplies	60	<u>106</u>	<u>129</u>	<u>106</u>	<u>129</u>	<u>0.9</u>	<u>1.2</u>
Total		668	745	732	832	12.6	16.4

Source: Economics Research Associates

Table 40

PROJECTED NEW RETAIL SPACE
REQUIRED IN THE PROJECT AREA
1980-1985

<u>Merchant Group</u>	<u>Existing Sq. Ft. (000)</u>	<u>Planning New Retail Space (Square Feet 000)</u>		
		<u>1975- 1980</u>	<u>1980- 1985</u>	<u>Crocker Hills</u>
Apparel, General Merchandise, Specialty	60	0	0	1.5
T. V. /Stereo	40	10	5	0.1
Home Furnishings and Appliances	39	15	10	1.7
Building Materials	68	--	--	--
Groceries, Drugs	58	6	10	1.3
Autos - Used	94	0	0	0.9
Restaurants, Bars	39	13	5	1.5
Autos - New	150 ^{1/}	--	--	--
Auto Supplies	<u>109</u>	<u>20</u>	<u>0</u>	<u>1.2</u>
Total	657	64	30	8.2

^{1/} Based on assumption that an auto center is developed.

Source: Economics Research Associates

existing space, if all existing space is usable. (Detailed evaluations of building conditions will take place in subsequent planning stages.)

Under this assumption, Table 40 shows that approximately 64,000 square feet of new retail space will be required by 1980. By 1985, additional space requirements will be approximately 30,000 square feet. In addition, if Crocker Hills is developed as anticipated another 8,000 square feet of retail space could be supported. These figures are utilized in the last section of this report to derive a preliminary phased development program.

SECTION VI

MARKET SUPPORT FOR SERVICES

The analysis of market support for services in the project area is different from the analysis of retail space needs. The same type and amount of data is not available concerning what people spend on services. The concept of a primary trade area does not apply directly. However, there are a number of methodologies which provide useful guidelines for service needs in an area.

This section defines services broadly to include the following categories:

- Personal Services
- Commercial Services
- Recreation/Entertainment
- Transient Accommodation

Each of these categories is analyzed separately below.

PERSONAL AND COMMERCIAL SERVICES

Space needs for personal and commercial services are derived in the same way. Personal services include such things as hairdressers, shoe repair, airline ticket agents and so forth. Commercial services include such things as banks, insurance sales offices, realtors, and so forth. These types of outlets generally serve an area smaller than the primary trade areas, which we call the primary service area.

For purposes of this analysis, the primary service area includes the nine census tracts in which the project area is situated, and immediately surrounding it. The general outline of this primary service area is shown in Figure H. The population in this area is projected to reach 44,170 by 1980 and 45,275 by 1985.

There are generalized standards for the amount of space for services which is required by a typical community of a given size. However, these per capita standards do not apply equally in all communities. For instance, in a community such as Daly City, the residents are offered a wide variety of shopping opportunities in the area and will depend to some extent on the services offered by San Francisco. The standards applied here have been adjusted to reflect these factors.

Table 41 calculates the potential demand for various types of services in the RPA. Standards for per capita space needs are applied to projected population and then adjusted to reflect the level of service which can reasonably be provided by the project area. On this basis, there will be a need for approximately 106,000 square feet of space for personal services by 1980. Space needs for financial / real estate / insurance services will reach 39,000 by 1980 and 47,000 by 1985. Space needs for commercial recreation / entertainment will be 15,000 in 1980 and 22,000 in 1985.

To calculate the new space required for services, Table 42 compares total space needs to existing space. As in the analysis of retail space, it is assumed that all existing space in the project area is suitable for its current use. On this basis, there will be no new space required for personal services. Financial / real estate / business services will require an additional 7000 square feet by 1980 and another 8000 by 1985.

In general, it appears that the RPA has sufficient space to provide personal services, although better quality services are needed. Through consolidation of some services and more efficient utilization of existing space, the amount of services could probably even be increased somewhat without any new space. However, demand from Crocker Hills could require up to 3000 square feet of space by 1980. In addition, the potential support from on-site groups (BART riders, residents, employees) indicates that some new space for these services should be provided if the multi-use complex is developed.

RECREATION/ENTERTAINMENT

Tables 41 and 42 also calculate the space needs in the RPA for commercial recreation and entertainment. This category includes movie theatres, family billiard parlors, arcades, and so forth. As shown, no such space exists in the RPA at this time. Thus, it is estimated that approximately 15,000 square feet could be supported by 1980 and another 7,000 square feet by 1985.

Table 41
POTENTIAL DEMAND FOR SERVICES
IN THE PROJECT AREA

	<u>Primary Service Area</u>		<u>Crocker Hills</u>
	<u>1980</u>	<u>1985</u>	<u>1980-1985</u>
Population	44, 170	45, 275	3, 000
<u>Per Capita Space Needs (Sq. Ft.)</u>			
Personal Services	4.0	4.0	4.0
Financial/Real Estate/ Insurance	1.2	1.4	1.2
Recreation/Entertainment	0.7	1.0	0.7
<u>Total Space Needs for Services</u> <u>(Square Foot 000)</u>			
Personal Services	176	181	12
Financial/Real Estate/Insurance	53	63	3
Recreation/Entertainment	31	45	2
<u>Level of Services Provided</u> <u>By Project Area</u>			
Personal Services	60%	60%	25%
Financial/Real Estate/ Insurance	75	75	50
Recreation/Entertainment	50	50	30
<u>Space Needs in Project Area</u> <u>(Thousands Sq. Ft.)</u>			
Personal Services	106	108	3.0
Financial/Real Estate/ Insurance	39	47	2.0
Recreation/Entertainment	15	22	0.6

Source: Economics Research Associates

Table 42

NET NEW SPACE NEEDS FOR
SERVICES IN THE PROJECT AREA
(Thousands)

	Existing Space Sq. Ft.	Incremental Space Needs		
		Without		To Service
		Crocker Hills	Crocker Hills	Crocker Hills
		<u>1975-</u> <u>1980</u>	<u>1980-</u> <u>1985</u>	<u>1980-1985</u>
Personal Services	109	0	0	3
Financial/Real Estate/Insurance	32	7	8	2
Recreation/Entertainment	<u>0</u>	<u>15</u>	<u>7</u>	<u>0.6</u>
Total	219	22	15	5.6

Source: Economics Research Associates

This amount of space would bring the level of commercial recreation services in the RPA in line with standards for an area of this size. In addition to this space for commercial recreation, there may be a need for family-oriented recreation facilities which could be provided either by the city or a commercial venture. The household survey, for instance found that "recreation facilities" and "youth center" had among the highest ratings as suggestions to improve the area.

These types of facilities might include roller skating, ice skating, gymnasiums, meeting rooms, and so forth. If the RPA is to function as a center for the surrounding community, some of these types of facilities should be provided. Usually, these types of facilities are provided in scattered locations throughout an area. However, a number of communities recently have found it advantageous to combine a variety of community recreation facilities in one structure. Locating such facilities within close proximity to one another creates significantly greater drawing power. This is particularly true if an older unused structure is available somewhere in the area. To build a new structure to house these facilities would be prohibitively expensive.

For these reasons, ERA recommends that the planning team seek to identify a suitable structure in the RPA of approximately 25,000 to 50,000 square feet, which could be converted to use as a multi-use recreation center. Such a center would attract people to the RPA both daytime and nighttime. It could be a major activity generator, without competing with other uses in the RPA. It would serve the on-site residents, daytime employees, and local population in the area; and help create an integrated sense of community in the RPA.

The Recreation Center Concept(If Done Commercially)

The basic purpose of the proposed facility is to provide a multiple-use recreation center in a pleasant atmosphere with activities appealing to all age groups. As envisioned, there would be ice skating, roller skating, and games for the children; theater and dancing for the adults; and dining, billiards, and combinations of activities for the family as a whole. All

these activities would be offered for one admission price. The complex would be designed to include a wide range of high-density entertainment components and would operate at a relatively fixed cost regardless of attendance level.

The complex would also offer security, appealing personnel, cleanliness, artistic decor, lighting, flowers, children's play equipment, distorting mirrors, live entertainment (skating professionals, dance professionals, musicians, school musical groups, etc.), gags, clowns, a nursery, puppet shows, a storyteller, magicians, group games, and so on. These features would compliment the major recreational components and, at the same time, help differentiate the project from other entertainment facilities.

To further enhance the attendance potential, the complex could operate the food and beverage sales on a break-even basis. The motive for offering quality food at a low price is to broaden the market by providing an additional incentive for visiting the complex.

ERA recently conducted a feasibility study for such a complex, a re-use of an air-terminal in Dallas, Texas. The facility opened in December, 1975, and has been doing extremely well.

TRANSIENT ACCOMMODATIONS

ERA has also analyzed the potential for new hotel and motel rooms. Currently in the project area, there are three motel or trailer park establishments:

Mission Bell Motel

San Francisco Motel and Trailer Park

Golden Gate Motel Trailer Park

These establishments offer low-priced accommodations for tourists who wish to stay outside San Francisco and monthly rentals.

There are two techniques for analyzing demand for transient accommodations: per capita projection and quantifying demand sources. Per capita projections are difficult to apply in a small area and when they are applied to a large area, the standards vary greatly depending on competitive factors. Therefore, ERA

has instead evaluated specific sources of demand.

Under this approach, the analyst looks at all the traditional sources of demand and attempts to quantify the demand for the subject city or site. Prior to quantifying demand in this manner, it is best to first examine the "indications of demand" from each group to see if a quantified analysis is necessary. The results of this assessment are outlined below:

Present situation

- o Only facilities of this type in the project area are older, low-price facilities.
- o Owner of Mission Bell Motel indicates that his major marketing advantage is price. It is an old facility, written down; he can very competitive and appeal to salesmen on tight expense accounts as well as families who can't afford the high cost of two rooms at a newer facility. Also, people staying for a week or so looking for homes or on extended assignment find the rates appealing.
- o A new facility could not be competitive from a price standpoint at present building costs, so it must be a reasonably high quality (cost) facility.

Indicators of Demand

A. Business visitors

- o Few major businesses in area which attract overnight business stays, unlike headquarter firms in S.F. or electronic firms in Palo Alto - San Jose area.
- o No particular reason for business visitor to stay in Daly City except for price. He is not close to customers (in great numbers) not close to entertainment, nor proximate to airport for business meetings.
- o Conclusion - limited support from businessmen except those with customers in area or those seeking lower priced accommodations.

B. Tourists

- o Tourists normally like to be where the action is, unless they can get a particularly good deal staying on the periphery. Daly City is not in the "action area." Also, a new facility with high costs, could not offer particularly low prices. In our opinion it would be a dangerous market in which to compete.
- o Very marginal identification for tourists - negative if anything.
- o BART could be an advantage, but would have to be well publicized. More important to businessmen.

C. Transients

- o A risky market for the motel business. Van Ness Avenue is best example of a good transient location, but it is near the action and is also well known as motel row - people look there.
- o A motel along Junipero Serra Boulevard could get good exposure, but lack of nearby shops, restaurants, etc. and distance from San Francisco seem negative.
- o Also, Highway 280 is not a major tourist route coming into San Francisco.

D. People visiting friends

- o Would be best source of business for motel in RPA. Good resident base with little competition. However these visitors are not big spenders, will eat with friends. Also, friends might suggest they get closer to "big city".

Conclusion

- o There are not enough solid sources of demand to forecast need for motel, (although one would certainly be desirable.) The best chance for success would be something developed by popular local person that would develop a solid following for the restaurant operations,

banquets and get businesses in area to recommend people staying there.

- o We do not see sufficient indication of support to go into a detailed quantification of demand.
- o It may be desirable to allow for the possibility of a motel in the future. At least one alternative plan could suggest a site somewhere in the RPA.

Section VII

MARKET SUPPORT FOR RESIDENTIAL DEVELOPMENT

The inclusion of new residential units in the RPA is desirable for several reasons. On-site dwelling units will assure that the RPA will be a 24-hour activity center, and not deserted after five o'clock and on weekends. This continuous activity would provide more efficient use of the physical and commercial amenities planned for the area, as well as providing additional support, and added security.

The Junipero Serra corridor would be a better location for residential development than the Mission Street corridor, because of its proximity to BART and the views that are afforded from Junipero Serra. Because of the size and configuration of this site, the new housing should be multiple-family units-townhouses and high rise types. The accessibility and exposure of the site make it well suited to residential development. In addition, the convenience of BART and the excitement of a new urban environment will be strong selling advantages. The market support for residential units in the RPA is quantified in this section.

RESIDENTIAL DEVELOPMENT TRENDS

One gauge of residential construction activity in the market area is the historical trends recorded by building permit authorizations. The annual number of building permits issued in the market area is indicated in Table 43. As shown, the average annual authorization in San Mateo County increased from 3,860 units during the 1965 - 1969 period to 5,810 during the 1970-1974 period. In Daly City, the average increased from 600 to 917, an increase in authorization of over 50 percent.

While the total number of authorizations was increasing dramatically, the distribution by housing type was changing. During the 1965-1969 period 51.1 percent of authorization in San Mateo County were for multiple family units. During the 1970-1974 period this percent increased

Table 43

TRENDS IN BUILDING PERMITS
IN SAN MATEO COUNTY
1965-1975

	San Mateo County		Daly City	
	<u>Total Units</u>	<u>Percent Multi- Family</u>	<u>Total Units</u>	<u>Percent Multi- Family</u>
1965	6,685	55.1%	1,502	57.6%
1966	3,435	60.7	212	67.4
1967	2,665	33.7	365	47.6
1968	3,429	51.3	466	48.2
1969	3,099	46.4	448	49.7
Five-Year Total	19,313	51.1%	2,996	54.5%
1970	5,549	76.9%	423	43.9%
1971	7,143	64.4	565	21.5
1972	8,479	64.3	1,843	24.3
1973	6,156	65.7	1,510	81.9
1974	2,166	27.7	245	89.9
Five-Year Total	29,493	64.3%	4,586	45.9%
1965-1969 Average	3,860		600	
1970-1974 Average	5,810		917	

Source: San Mateo County Building Department and Economics Research Associates

to 64.3 percent. In Daly City the percent of multi-family units declined to a low of 21.5 percent in 1971 but has increased dramatically to 90 percent in 1974.

This trend towards a greater number of multi-family units coincides with the national trend, where more than 50 percent of the new housing construction is for multi-family units. This indicates the potential for increased market acceptance of higher density ownership housing.

Another indication of the demand for housing in the market area is the vacancy rate in existing housing. Vacancy rates in the area, as indicated by two sources, are shown below:

	Postal Vacancy Survey	PG&E Idle Meter	
	<u>1975</u>	<u>1974</u>	<u>1975</u>
Brisbane	2.8%	na	na
Daly City	8.3	na	na
South San Francisco	3.5	0.7	0.7
San Bruno	6.0	1.2	0.9
Burlingame	4.5	na	na
San Mateo County	na	1.2	1.1

Postal vacancies are higher because they count households on vacation as vacant. The PG&E readings show extremely low vacancy rates and a trend toward even lower rates. Based on this data and our own recent surveys in the area, we conclude that the vacancy rates are probably somewhere in between this range of rates.

To determine the capability of north San Mateo County to accommodate future projected housing demand, ERA conducted a telephone survey of the planning departments of cities in the area. The results of this survey are presented in Table 44. As shown, the communities in North San Mateo County (excluding Pacifica-Hillside which

Table 44

POTENTIAL FOR DEVELOPING MULTI-FAMILY DWELLING UNITS

<u>City</u>	<u>Vacant Acres Available</u>	<u>Average Actual Densities (Units/Acre)</u>	<u>Potential Multi-Family Units</u>
San Francisco	177	50	9,000
Daly City	110	25	2,750
Pacifica-Hillside	450	13	5,850
Other Pacifica	174	13	2,262
San Bruno	15	20	300
Foster City	74	17	1,258
South San Francisco	45 ^{1/}	6	270
Crocker Hills ^{2/}	66	18	1,250
Burlingame	0	0	0
Belmont	0	0	0
Millbrae	0	0	0
Brisbane	<u>10</u>	<u>20</u>	<u>200</u>
Total	1,121	20	23,140
Total-excluding San Francisco & Pacific Hillside	450	18	8,290

^{1/} Assumes that 4 acres (25-30 lots) convert from single to multi-family development.

^{2/} Northeast Ridge only.

Source: Economics Research Associates Telephone Survey, April 1976.

has not been re-zoned or masterplanned) have sufficient land zoned to accommodate up to 8,290 multi-family dwelling units. This is a relatively low capacity in view of projected demand for multi-family units in the area, as shown below:

PROJECTED HOUSING DEMAND

Table 45 presents projections of total housing demand in north San Mateo County and estimates of project area potentials. As shown, over the next ten years, approximately 13,000 households will require new housing. Of this total, approximately 6,250 will be rental units and 1,954 will be multiple-ownership units. The total demand for multiple-family units will be 8,200 units.

The Junipero Serra site is well suited to residential development. And as shown above, the amount of vacant land to accommodate multiple-family units is just barely adequate to meet demand. Thus, the RPA could expect to capture a reasonable share of total market demand. In a market of this size, 5 percent of the total rental market would be a reasonable market share for one site. However, because of the attributes of the site, a development of multiple-ownership units (townhouse or high rise) could capture up to 10 percent of the market.

Using these estimates of market share, Table 45 calculates that the RPA could support approximately 500 multiple-family dwelling units by 1985. The estimated mix of housing by type is approximately 3 to 2, rental to ownership.

A more detailed demand analysis by housing price should be undertaken prior to development. At this preliminary planning stage, however, it is useful to analyze the existing family incomes and affordable housing prices in the market area. Table 46 summarizes recent data on incomes and affordable housing in the area. As shown, new rental units renting for \$266 or more per month could be afforded by

Table 45

POTENTIAL PROJECT AREA
HOUSING DEVELOPMENT
1975 - 1985

	<u>1975- 1980</u>	<u>1980- 1985</u>	<u>Total</u>
<u>New Households</u>			
San Mateo County	14,580	16,440	31,020
North County ^{1/}	6,123	6,904	13,027
<u>Percent Distribution By Type</u>			
Rental	45%	50%	48%
Multiple Unit Ownership ^{2/}	16	15	15
Single Family Ownership	39	35	37
<u>Number of New Housing Units By Type</u>			
Rental	2,755	3,452	6,252
Multiple Unit Ownership	979	1,035	1,954
Single Family Ownership	2,387	2,416	4,819
<u>Project Area Share of New Housing By Type</u>			
Rental	5%	5%	5%
Multiple Unit Ownership	10	10	10
Single Family Ownership	0	0	0
<u>Potential Project Area Housing Development By Type</u>			
Rental	140	170	310
Multiple Unit Ownership	100	100	200
Total	<u>240</u>	<u>270</u>	<u>510</u>

^{1/} Based on ABAG-MTC growth projections, showing that 42 percent of growth in San Mateo County will occur in the North County Area.

^{2/} Estimated at 30 percent of total ownership units.

Source: Economics Research Associates

Table 46

INCOME AND AFFORDABLE HOUSING IN
SAN MATEO COUNTY ^{1/}

<u>Annual Household Incomes</u>	<u>Percent of North San Mateo Households</u>	<u>Affordable Housing Rent</u>	<u>Home Price^{2/}</u>
Under \$5,000	4.5%	Under \$123	Under \$16,500
\$5,000-\$7,999	12.4	\$123-\$191	\$16,500-\$25,599
\$8,000-\$9,999	12.4	192- 228	\$26,000-\$30,999
\$10,000-\$11,999	16.0	229- 265	\$31,000-\$35,999
\$12,000-\$14,999	16.0	266- 321	\$36,000-\$43,499
\$15,000-\$19,999	21.3	322- 399	\$43,500-\$53,999
\$20,000-\$24,999	7.9	400- 479	\$54,000-\$64,999
\$25,000 & over	9.0	480 & over	\$65,000-over

^{1/} Estimates of the number and type of units by income category is an estimate, based on preliminary developer information.

^{2/} Based on a recent survey of Bay Area lending institutions the ratio of home value to income ranges from 2.5 to 3.3. The higher ratio was applied to the lower income groups.

Source: San Mateo County Staff Report on San Bruno Mountain, 1975, and Economics Research Associates.

over 50 percent of the market. New ownership units priced at \$36,000 and up could be afforded by over half of the market.

Although the exact configuration of various land uses in the multi-use complex near the BART station has not been determined, it is envisioned that the complex will be planned to create sites and environments that are suitable for residential development. The area is large enough to allow high rise residential development to share the excitement of the active plazas and malls and yet provide the privacy, security and quiet that is necessary for residential areas.

Section VIII

MARKET SUPPORT FOR OFFICE DEVELOPMENT

In addition to retail, new office space often forms an important component of redevelopment projects. The construction of new office space is beneficial in that (1) it provides new life in the community in terms of people working in the downtown area, spending money for food and merchandise, and (2) the tax ratables from office buildings are attractive.

Daly City for its size has a very limited number of office buildings and space in these buildings. This is mainly attributable to its close proximity to the very large concentration of office space in San Francisco. The development of suburban office space complexes is a relatively new phenomenon since the end of World War II and Daly City has yet to share in this movement. However, the construction of the BART station opens up some definite opportunities for Daly City to develop quality office space. This space would be geared mainly to persons with businesses or residences in San Mateo County who would benefit from the convenience of BART to San Francisco yet do not require a San Francisco address.

METHODS OF FORECASTING OFFICE SPACE DEMAND

There are two basic approaches to forecasting office space demand:

1. Demand projection based on employment forecasts -

This method tends to understate total demand needs because it does not take into account the continual upgrading of office space by most business. A review of most forecasts of this type show that these forecasts are considerably lower than the amount of office space actually absorbed. However, an examination of employment trends is important to give an overall perspective to an office demand forecast.

2. Demand projection based on historic absorption trends -

Because of the weakness pointed out in the employment forecast method, the absorption projection is used more often. However, this method can produce major distortions depending on the period picked for analysis. If the period is too short or has been a boom period, or conversely a very low activity period, the projections can be seriously distorted. Office building activity tends to move in swings, rather than in a straight line and new, attractive projects will often draw tenants from buildings which, though structurally sound, are functionally obsolete.

Because of the weaknesses inherent in each method, we have chosen to examine both techniques and combine the best attributes of each in arriving at a projection of demand and then relate it to the potential project area site.

Demand Based on Projected Employment

A forecast of employment in San Mateo County for the period of 1975 to 1985 is shown in Table 47. The table shows total employment increasing from 241,750 in 1975 to 275,600 in 1985, an increase of 14 percent over the decade. Distribution of these increases varies substantially as shown in the table with New Technology accounting for the single largest increase, in percentage terms - 53 percent by 1985.

The forecast of employment is converted into office space demand for San Mateo County in Table 48. The share of employment that uses office building is first determined, then that number is converted to square feet of office space by the use of a square foot per employee factor which has been developed from previous studies and sources. The use of the new employment forecasts results in a demand for office space from this source of approximately 1 million square feet between 1975 and 1980 and 1.2 million square feet between 1980 and 1985.

If the analysis were to stop here it would ignore the very im -

Table 47

PROJECTED EMPLOYMENT IN SAN MATEO COUNTY
1975-1985

	<u>1975</u>	<u>1980</u>	<u>1985</u>	<u>Increase</u>	
				<u>Number</u>	<u>Percent</u>
<u>Basic Employment</u>	116,910	126,070	136,480	19,570	16.7%
National Headquarters	2,370	2,680	2,870	500	21.0
New Technology	14,010	17,630	21,440	7,430	53.0
Federal/State Governments	8,110	8,140	8,810	700	8.6
Other	92,420	97,620	103,360	10,940	11.8
<u>Population Serving</u>	124,840	133,040	139,120	14,280	11.4
Finance-Insurance-Real Estate	7,700	7,910	8,440	740	9.6
Local Government	24,620	26,020	27,610	2,990	12.1
Retail/Trade	36,130	37,570	39,500	3,370	9.3
Local Service	35,440	38,760	39,870	4,430	12.5
TCU	5,830	6,270	6,830	1,000	17.1
Construction	15,120	16,510	16,870	1,750	11.5
<u>Total Employment</u>	241,750	259,110	275,600	33,850	14.0
Private Sector	209,020	224,950	239,180	30,160	14.4
Public Sector	32,730	34,160	36,420	3,690	11.2

Source: County Employment Projections for San Francisco Bay Region, 1970-2000, ABAG/
Cal. Trans./MTC

Table 48

PROJECTED OFFICE SPACE DEMAND
IN SAN MATEO COUNTY
1975-1985

	<u>1975- 1980</u>	<u>1980- 1985</u>
<u>Private Office Demand</u>		
New Employment	15,930	14,230
Percent in Office Buildings	30%	33%
Number in Office Buildings	4,779	4,695
Square Feet Per Employee	180	190
Office Space Required (Sq. Ft.000)	860	890
<u>Public Office Demand</u>		
New Employment	1,430	2,260
Percent in Office Buildings	70%	75%
Number in Office Buildings	1,001	1,695
Square Feet Per Employee	155	165
Office Space Required (Sq. Ft.000)	155	280
New Office Space Demand (Sq. Ft.000)	1,015	1,170
Replacement Demand ^{1/}	1,000	1,000
Total New Space Demand	2,015	2,170
Existing Vacant Space	600	0
New Space Required	1,400	2,170
Normal Vacancy Allowance--10%	<u>140</u>	<u>210</u>
Net New Office Space Required (Sq. Ft.000)	1,540	2,380
Annual Requirement (Sq. Ft.000)	308	470

^{1/} Estimated at 200,000 square feet per year based on trends in recent past.

Source: Economics Research Associates

portant demand from the upward mobility of existing firms from older buildings to newer, more attractive office facilities. This factor is a difficult one to determine since it is affected by the condition of the existing buildings, the shifts in the nature of business of various firms, and overall increases in office space for certain types of activities that might formerly have taken place in a manufacturing plant.

In this analysis we started with a factor of 5 percent per year for upgrading and conversion of older buildings and then reviewed this against the overall absorption levels of office space in recent years. Our conclusion was that a replacement demand of approximately 200,000 square feet per year or 1 million square feet over the five year period was a reasonable estimate for planning purposes. Thus, using these two sources of demand, the total demand for the County is slightly over 2 million square feet between 1975 and 1980 and 2.2 million square feet between 1980 and 1985. When the existing vacant space is accounted for and an annual vacancy allowance is added, the total demand for 1975 to 1980 is 1.5 million square feet or approximately 300,000 square feet per year, increasing to over 450,000 square feet after 1980.

Demand Based on Absorption of Office Space

Historical absorption data for office space is difficult to obtain. However, the San Mateo County Development Association keeps records on new office buildings constructed and their occupancies, and we have drawn heavily on this source as well as discussions with realtors specializing in office space and developers of such space. Table 49 presents a summary of office space by city.

Over the past four years, an average of 400,000 square feet of office space has been absorbed each year in San Mateo County. However, this amount has varied dramatically by year as shown in the following:

Table 49

SURVEY OF SELECTED MULTI-TENANT OFFICE BUILDINGS
IN SAN MATEO COUNTY

Location	Sent/ Recd	Total Sq. ' in Bldg.	Avail. Sq. ' in Bldgs.	Vacancy Percent	# of Tenants	Approx # of Emp.	High/Low & Average Pr. Sq. Ft.
Daly City	3/1	80,000	45,000	56%	17	300	.65
Brisbane							
So San Francisco	8/5	105,465	25,300	24	52	263	.40-.55/.48
San Bruno	5/1	45,421	18,646	41	19	108	.60
Millbrae	10/2	33,581	15,988	48	24	68	.45-.52/.50
Burlingame	50/25	739,547	130,863	18	358	2,431	.45-.65/.55
San Mateo	44/23	1,514,190	190,608	13	240	4,406	.20-.75/.58
Foster City	6/4	109,085	60,866	56	36	298	.50-.65/.59
Belmont	5/1	6,853	578	9	5	32	.50
San Carlos	7/1	22,346	2,940	13	26	90	.54
Redwood City	22/4	32,102	900	3	24	78	.20-.40/.32
Menlo Park	19/6	270,052	14,800	5	98	1,021	.50-.73/.61
Totals	179/73	2,958,642	506,489	17%	899	9,095	.55

Source: San Mateo County Development Association, Survey of Office Buildings,
Sept., 1975. (179 forms were sent. 74 returned)

	<u>Absorption (Sq. Ft.)</u>
1972	398,000
1973	602,000
1974	387,000
1975	224,000

As may be seen, two of the years were very near the average while the boom year of 1973 produced a 50 per cent increase above the average and 1975, an economically depressed year reflected this condition with only 224,000 square feet.

Despite the relatively short time period of this absorption data, it does reflect both periods of high economic and low economic activity. The results of the absorption analysis compare very closely to that derived from the employment forecast plus replacement analysis. Therefore we have concluded that an average annual absorption of 400,000 square feet of office space in San Mateo County is a good figure to use for planning purposes.

CHARACTERISTICS OF SELECTED OFFICE PARKS

Table 50 presents pertinent characteristics of selected office developments in San Mateo County. The characteristics of these developments are summarized below:

Westlake

The office space here is old and small. It is generally not considered first class space. It has been fully occupied for many years. The tenants are primarily financial and medical-related.

In spite of its proximity to the RPA, it is not anticipated that Westlake would compete directly with the proposed development. Many of the potential tenants in the RPA would be new businesses moving into the area from elsewhere on the peninsula.

Table 50

CHARACTERISTICS OF SELECTED OFFICE DEVELOPMENTS IN
SAN MATEO COUNTY

Name	Date Compl.	Size (Sq.Ft.)	Vaca- ncy	Rent per Sq. Ft.	Comments
Westlake Daly City	1956	50,000	0%	\$.60-.65	Older office space
Serramonte Daly City	1973	80,000	22	65-.70	Recent absorption increasing
Cabot, Cabot, Forbes So San Francisco	1969	141,000	3	0.50	Steady absorption
3000 Sand Hill Menlo Park	1968-72	180,000	11	.70-.75	Prestige Space-Small Tenants
Interland Office Center San Mateo	1973-74	225,000	1	.68-.78	Airport-related users
Peninsula Office Park San Mateo	1972-75	209,000	5	.56-.72	3 buildings pre-leased
Page Mill Hill Palo Alto	1973-75	147,000	0	.58-.67	Primarily by R & D
One Peninsula Place San Mateo	1972-75	208,000	8	.71	National Tenants

Source: San Mateo County Development Association;
Coldwell, Banker Commercial Brokerage Company; and
Economics Research Associates

Serramonte

Serramonte is the largest concentration of office development in Daly City. There is approximately 80,000 square feet of space there. Until recently, there was 30,000 square feet of vacant space. However, in recent months, the market has picked up and they now have only about 18,000 square feet vacant. Most of this space should be leased out by the time new space is developed in the RPA. American Can Company may occupy a new single tenant building in the park.

The tenants at Serramonte are all types. There are a large number of financial/insurance firms, and some medical-related tenants. They emphasize the proximity to BART in their advertising and offer a pick-up service at BART for their tenants. Obviously, office space in the RPA would have an even stronger advantage in terms of proximity to BART.

Cabot, Cabot and Forbes

The Grandview Business Center is located in South San Francisco, east of Bayshore Highway, just off Oyster Point Boulevard. Proximity to the San Francisco International Airport is a significant advantage of this site. The park also offers custom designed warehouse and office space. This park has had a consistently good absorption rate since it first opened. Many of the office tenants also lease related warehouse space.

3000 Sand Hill Road

This office complex was the first experiment with multi-tenant speculative office space in a rural setting back of Stanford. Although it won design awards, leasing went slowly initially but it has been fully leased for some time at rates which are comparable to new high rise buildings such as the Dillingham Palo Alto Square complex. Its location on Sand Hill Road in close proximity to Interstate 280 offers convenient access from north and south as well as connections to Stanford University and the Stanford shopping center and office complex.

One Peninsula Place

This complex of lesser quality than the other projects has outstanding exposure from Highway 101, although access is indirect. The majority of space is occupied by tenants of national prominence in spaces up to 9,000 square feet. These tenants benefit from the central location with proximity to San Francisco, Southern Peninsula, and East Bay areas via Highway 101 and the San Mateo Bridge located two miles east.

Interland Office Center

The Interland Office space has the highest quality space of all San Mateo garden office complexes. The site has view amenities and good access to State Highway 92 which connects to I-280 and U.S. 101. The success of this complex is based in part on its San Mateo identity, proximity to San Francisco and particularly its easy access to the San Francisco airport. The major space user is Hughes Air West which occupies 110,000 square feet.

Peninsula Office Park

This complex was constructed in four phases. The first three phases were completely leased prior to construction completion. fourth building was completed in early 1975 and was not leased up prior to completion. The reduced demand is attributed to the economic slow down. The complex, situated on San Mateo hillsides, thus has view amenities. A shopping center and restaurants are nearby. Access to Highway 92 is very good. There are numerous national tenants occupying large spaces that benefit from the proximity to San Francisco and the airport.

Page Mill Hill

This Palo Alto complex has a setting similar to the 3000 Sand Hill Road and subject sites with proximity to Interstate 280. The site is

situated in the prestigious and attractive Stanford Industrial Park with excellent exposure from intersecting Page Mill and Foothill Expressways. Most tenants are industrial - research and development oriented. The complex was almost completely leased prior to construction completion although two tenants took up over 50 percent of the space.

Planned Office Developments

In addition to the existing office space discussed above, there are a number of developments in various stages of planning in the County. The San Mateo County Development Association and Coldwell Banker have provided the following information on planned office developments, which could be on the market sometime after 1976.

	Size	Odds on Going Ahead	Forecast (Sq. Ft.)
Bayhill	150,000 sq. ft.	70%	105,000
Spieker Crow	150,000 sq. ft.	10	15,000
S. Diller	75,000 sq. ft.	40	30,000
Redwood Shores	60,000 sq. ft.	30	18,000
Richmond-E. Millsdale	100,000 sq. ft.	10	10,000
Woodruff	50,000 sq. ft.	70	35,000
Anza Pacific	80,000 sq. ft.	40	<u>32,000</u>
Subtotal			245,000
Crocker Hills	300,000 sq. ft.	20	<u>60,000</u>
Total			305,000

POTENTIAL FOR OFFICE SPACE IN RPA

The Junipero Serra corridor near the BART station has a number of attractive features for office development:

- o Proximity to BART for persons who need ease of access to San Francisco and other BART connecting points.

- o Visibility from I-280 for identification.
- o Ease of access to residential areas in San Mateo County for persons requiring office space who want more convenience to their residences combined with ease of access to San Francisco.

While there are no directly comparable examples of commercial office development which are tied directly to BART stations, there are many successful examples of office buildings and transit stations in midwest and eastern cities as well as in Canada. One of the best prototypes of such development is in Greenwich, Connecticut which has an air rights development above the New Haven Railroad Station. Located in an exclusive residential area, the offices are leased by persons and firms that desire to their residences, yet ease of access to New York City.

BART officials anticipate that there will be significant office development adjacent to BART stations. In Walnut Creek a major office building is located near the BART station but not tied in directly with it. In downtown Oakland, a proposed major office complex was planned to tie into BART. According to BART officials, the Daly City station is particularly well suited for office development and is capable of handling one train every 4 or 5 minutes. The actual number of trains will be contingent on several factors:

- (1) Local bus service to the station.
- (2) More parking.
- (3) Improvement in the maintenance of BART trains.

Once these problems are overcome, the advantages of the BART station location will be even further enhanced.

While the site has certain inherent physical and locational advantages, it faces strong competition in a market which will not be

absorbing office space much faster than historical trends. San Mateo County locations will never compete directly with San Francisco as a location for headquarters for local, regional and national offices. However, for those smaller tenants seeking suburban locations, the RPA site can expect to compete favorably.

Taking into consideration the number of competing locations and facilities, we believe that the development of 200,000 square feet of quality office space in two phases over a 10 year development program represents a reasonable market expectation for a site on Junipero Serra Boulevard adjacent to the BART station. This represents an average annual absorption of 20,000 square feet per year or approximately 5 percent of the total San Mateo County office market. The 200,000 square feet would make the Daly City complex one of the largest in San Mateo County.

Section IX

RECOMMENDED REDEVELOPMENT PROGRAM

In this section the findings in the previous sections on market support for the various components of the Daly City Redevelopment Area are drawn together to indicate the marketable development program. General guidelines for this development are then discussed.

THE GENERAL CONCEPTS

The overall objective of the redevelopment project is to create an inter-related commercial-residential-urban center while at the same time preserving the basic retail orientation of the area. The specific strategy developed to achieve this goal is three-fold:

- (1) Reinforce the strongest existing commercial elements in the RPA-autos, and 'big ticket items.' (TV, Furniture, Appliances)
- (2) Introduce new viable uses where economically feasible.
- (3) Improve the quality and availability of the shopping and recreation opportunities in the area for the community served by the RPA.

While it is too early in the planning stage to define specific concepts for the area, there were certain general concepts which were used as guidelines in developing the marketable program. Some of these have been discussed earlier. They are briefly reviewed below.

Auto Center

The continued viability of the auto business is essential to the economic health of the RPA. Auto sales account for 38 percent of the sales in the RPA. Some existing dealers find it difficult to expand and may consider moving to another area. For this reason, the consultant team has considered developing a new integrated auto-center somewhere in the RPA. If this is done, it should be possible to expand total auto sales without increasing the total space devoted to auto-dealerships.

BART Station Complex

As discussed earlier, the site attributes and proximity to BART of the Junipero Serra corridor strongly suggest that a multi-use complex be developed in that area. The complex is not visualized as a regional shopping center. It is envisioned as primarily an office and residential complex with supporting retail.

Since this market study represents one of the earliest stages of the development process, the project has not entered the design stage, and the exact configuration of the complex has not been determined. However, it is anticipated that office space will be constructed in high rise towers near the BART station entrance, multi-family residential units at either the higher levels of the office buildings or in separate high rise or townhouse structures, and retail and entertainment functions at the ground level along pedestrian malls and plazas. This mix of uses would establish the area as a 24-hour urban activity center. The entire complex will be planned to maximize the functional relationships between the various uses.

Other Retail Development

There may be an opportunity to locate other retail nodes at the Top of the Hill or along Mission Street. One concept for such a node is a "big ticket" center - a sort of specialty center for furniture, TV/ stereo, and other big ticket items. This would be supported by substantial parking and nearby restaurants and fast-food outlets.

Another node could be a "mini-mall," which is a small shopping center without a major tenant. Such a center would require 8 to 15 acres and could include the following type tenants: food, drug, variety merchandise, fast food restaurants.

In addition, much of the new space for retail, services, and small offices would occur as in-fill along Mission Street.

SUPPORTABLE SPACE IN THE RPA

The previous sections have detailed the market support for retail, residential, service, and office space in the area. Using the general concept guidelines, ERA has developed a preliminary development program for the RPA. The amount of new space required for each use is summarized in Table 51. As shown the RPA could support an additional 94,000 square feet of retail space made up of 42,000 square feet for "big ticket" items, 15,000 square feet for groceries/drugs, and 17,000 square feet for restaurants and bars; and 20,000 square feet for auto-related uses. In addition the RPA can support approximately 200,000 square feet of office space, 500 multi-family dwelling units and 43,000 square feet of space for services-personal, commercial, and residential.

Table 42 presents the percentage increases in space which is represented by the program. The increases range from no increase for new autos (assuming more efficient use of space in a new auto center) to a 43 percent increase in restaurant/bar space. These increases reflect primarily the efforts of redevelopment, along with the compound effects of increasing population and spending.

It is felt that this development program is of sufficient magnitude to benefit from effects of synergism and that a "critical mass" with a regional identity can be established. The exact phasing of the project cannot be pinpointed at this time, as it will depend on the final design configuration. The design of the project should, however, conform to the market parameters derived in this study, and be planned for phasing into economic, functional and marketable increments. The phasing shown in Table 51 and 52, reflects these considerations.

PARKING REQUIREMENTS

The magnitude of parking required in the RPA will be quantified in a later phase of the study. At this point, however, several com-

Table 51

PRELIMINARY PHASED DEVELOPMENT PROGRAM

	<u>Incremental Space (Square Feet)</u>		<u>Total</u>
	<u>Phase I</u>	<u>Phase II</u>	
<u>Retail</u>			
TV/Stereo	10,000	5,000	
Furnishings/Appliances	7,000	10,000	
Other Big Ticket Items	--	10,000	
Subtotal	17,000	25,000	42,000
Groceries, Drugs ^{1/}	10,000	5,000	
Restaurants, Bars ^{1/}	10,000	7,000	
Subtotal	20,000	12,000	32,000
Autos - New ^{2/}	--	--	
Auto Supplies	10,000	10,000	<u>20,000</u>
Subtotal	<u>10,000</u>	<u>10,000</u>	94,000
Total Retail	47,000	47,000	
<u>Office</u>	100,000	100,000	200,000
<u>Residential</u>	250 units	250 units	500 units
<u>Services</u>			
Personal Services ^{1/}	3,000	3,000 ^{3/}	
Finance/Real Estate/Insurance	7,000	8,000	
Recreation/Entertainment	15,000	7,000	
Subtotal	25,000	18,000	43,000

^{1/} All of the new space for groceries/drugs/personal services and approximately half of the restaurant/bar space will go into Junipero Serra Complex.

^{2/} Space needs assuming an auto center is developed.

^{3/} Only if Crocker Hills is developed.

Source: Economics Research Associates, April 1976.

Table 52

PERCENT INCREASE OVER EXISTING SPACE RESULTING
FROM PRELIMINARY PHASED DEVELOPMENT PROGRAM

	Current Space Sq. '(000)	Percentage Increase		
		Phase I	Phase II	Total
<u>Retail</u>				
TV/Stereo	40	25%	12%	37%
Furnishings/Appliances	49	14	20	34
Other Big Ticket Items	n. a.	n. a.	n. a.	n. a.
Groceries, Drugs	58	17	9	26
Restaurants, Bars	40	25	18	43
Autos - New	150	0	0	0
Auto Supplies	109	9	9	18
<u>Office</u>	n. a.	n. a.	n. a.	n. a.
<u>Residential</u>	n. a.	n. a.	n. a.	n. a.
<u>Services</u>				
Personal Services	109	3	3	6
Finance/Insurance/ Real Estate	32	22	25	47
Recreation/Entertainment	0	n. a.	n. a.	n. a.

n. a. - means not applicable

Source: Economics Research Associates

ments can be made as these parking requirements relate to the marketability of the various components of the program. Of prime importance is recognition of the fact that the estimated level of market support for each use was based on the assumption that convenient and ample parking would be available in or adjacent to the complex. While BART may reduce the amount of parking required by shoppers, it will not eliminate the need for parking altogether or reduce the market sensitivity of various uses to the availability of adequate parking. Specifically, the residential development must have parking at the door. Parking for retail and office uses can be more remote, but should be located within a reasonable walking distance, with security and protection from the elements provided.

DEVELOPMENT GUIDELINES

In order to successfully implement this development program and maximize the benefits of the multi-land concept, several development guidelines should be followed.

It has been assumed that the area will be planned and designed to maximize the interrelationships of the various land uses, so that the retail and entertainment offerings are convenient to residents and office employees, and so that many of the public areas are busy with pedestrian activities throughout the day and night. This functional design must also allow for adequate security throughout the area, including parking areas. This can be accomplished through the use of lighting, controlled access and a security patrol.

It has also been assumed that the Junipero Serra complex will be integrated architecturally and through the use of naming, graphics and promotional activities will achieve market identity. The design of the shopping area should make it a people-oriented activity center, featuring pleasant landscaping, benches, and activities such as a sidewalk cafe or entertainment.

While it is believed that adequate market support exists for each of the recommended components of the proposed programs, it should be noted that each of the uses will face stiff competition from other developments throughout the area. It will therefore be necessary to aggressively promote the RPA, emphasizing the inherent advantages of its location and concept.

ELEMENT I

MAY 1976

EXISTING CONDITIONS PROBLEM IDENTIFICATION

SECTION B

AUTHOR: D'AMICO & ASSOCIATES, INC.

PLANNING

DALY CITY

REDEVELOPMENT PROJECT

PREPARED BY: THE DASA JOINT VENTURE

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**PREPARED FOR: THE REDEVELOPMENT AGENCY OF THE CITY
OF DALY CITY**

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SECTION I

INTRODUCTION

In the broadest sense, planning, as it relates to communities, deals with the management of physical change. In this context, general planning is the discipline communities utilize to establish broad policies for managing foreseeable development. Redevelopment planning, on the other hand, is a narrower discipline concerned with the correction of existing marginal or non-viable urbanization. It should be utilized as a sophisticated implementative tool in areas exhibiting economic, social and physical deterioration.

While the vernacular of redevelopment analysis is similiar to that of general planning (ie. land use, lot patterns, public facilities etc.) it should be remembered that the product of the analysis of these subjects differ for each of the two processes. While a general planning analysis results in a statement of community development policy, a successful redevelopment analysis must result in a flexible, action oriented, real estate program aggressively intervening in the Redevelopment Project Area's (RPA) real estate market for the purpose of reconfiguring misused land economically and physically in order to achieve its highest and best use.

The material presented in this division of the ELEMENT I EXISTING CONDITIONS/PROBLEM IDENTIFICATION report outlines the DASA team's analysis of the conventional planning elements for the purpose of problem identification.

The recommendations resulting from those analyses will be presented in ELEMENT II ALTERNATE CONCEPTUAL PHYSICAL REDEVELOPMENT PLANS which is to be prepared upon receipt and acceptance of this ELEMENT I by the Project Area Committee, Planning Commission and City Council/Redevelopment Agency.



0 1 2 3 4 500ft
December 1975

PROJECT AREA BOUNDARY MAP

DALY CITY REDEVELOPMENT PROJECT
REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER

PREPARED BY **RS A**

SECTION II

PROJECT AREA DESCRIPTION

The Redevelopment Project Area (RPA) is composed of two parcels as shown on Illustration A: Boundary Map. These parcels are not contiguous and basically conform to existing commercially zoned and/or utilized areas.

Parcel One may be described as the corridor established by Mission Street (California State Route 82) and its immediate environs. The boundaries of this parcel extend from the southerly limits of the City and County of San Francisco on the north to San Pedro Road at Daly City's southern boundary. Prominent landmarks within this parcel include the Daly City Memorial Community Center and the so called "Top of the Hill" commercial area at the intersection with John Daly Boulevard. This newly improved throughfare is the vehicular link with both Freeway I-280 and the BART Station. It also is the most direct linkage with RPA Parcel Two.



Illustration B - PARCEL ONE: MISSION STREET



Illustration C - MISSION STREET (TOP OF HILL)

Parcel Two consists of that portion of Junipero Serra Boulevard frontage and the Southern Pacific Railroad Company right-of-way extending from John Daly Boulevard and the Daly City BART Station on the north to the Daly City Corporation Yard and Junipero Serra Boulevard Freeway overpass on the south. The most readily distinguishing feature of this parcel is that it parallels and is bounded on the west by the Junipero Serra Freeway (I-280). The parcel does not include the BART Station or any portion of the John Daly Boulevard right-of-way.



Illustration D - PARCEL TWO: JUNIPERO SERRA BOULEVARD

SECTION III

GENERAL PLANNING OBSERVATIONS

The RPA comprises a major portion of Daly City's commercial development. Indeed, the Mission Street segment of the RPA contains the "Top of the Hill" area often referred to as downtown. While it is questionable that this area ever exhibited the qualities of a conventionarily defined central business district it is certain that the present configuration hardly deserves that designation. From a functional point of view, Daly City presently represents a corridor to transverse when proceeding from one out of town destination to another out of town destination. It is not a destination in itself and to use a cliché "There is no there there". This problem is probably the most important to be confronted during the design development phases of this study outweighing even the conventionally recognized problem of parking. What will be gained by providing unlimited parking for an area that has no attractive vitality. It is imperative that the RPA be redeveloped to provide those amenities, facilities and marketing elements which will establish a central commercial focal point for the City of Daly City.

Several opportunities for achieving and supporting such redevelopment activities exist including the advent of BART and I-280 as well as the "Top of the Hill" image already established in the public's mind and begging to be exploited to its full potential.

Physically, the lack of commercial concentration, the inappropriate mix of uses and the vacant land gaps all represent problems inhibiting the development of a truly viable central business district.

The Junipero Serra strip is a remnant of what was left of the old highway frontage after I-280 was constructed. It contains a melage of inappropriately mixed uses in functionally, visually and structurally obsolete buildings all sandwiched between the Junipero Serra right-of-way and the Southern Pacific Railroad tracks. This unfortunate right-of-way condition is acting as a formidable impediment to land reconfiguration, ready access from the residential community which potentially provides a consumer source for the area and general circulation problems of a high magnitude. Analysis of this area's conditions should give priority to the resolution of this problem.

One problem that is discussed in the following section of this division, but should be noted in any discussion of general planning observations relates to the lack of a positive RPA linkage between the two redevelopment areas. This missing RPA linkage especially between the Junipero Serra/John Daly intersection and the "Top of the Hill" represents an administrative impediment to the consolidation of a central business district comprehensively integrating the two most viable areas in the environs.

SECTION IV

RPA BOUNDARIES

Very real and practical political factors are often major determinants in the establishment of RPA's such as the one established in this instance. Such conditions create established realities to be recognized by the planner and the community.

Although a viable direction towards the achievement of Daly City's redevelopment aim can be achieved with the present boundaries of the RPA, it should be understood that, from a planning point of view, the present boundary designations constitute a significant project determinant to be considered.

It is evident to even the casual observer that the convergence of the Junipero Serra corridor and John Daly Boulevard at the Daly City BART Station potentially constitutes one of the most important locations in Daly City. This location has the potential of serving as the main entry to the RPA for an almost unlimited number of shoppers, workers and visitors provided viable integration of this asset into the area is achieved. The exclusion of this intersection and its contiguous areas (except for the northern portion of RPA Parcel Two) is clearly an inhibiting factor in providing this integration through the redevelopment process.



Illustration E - JUNIPERO SERRA FREEWAY



Illustration F - BART STATION

In addition, the exclusion of John Daly Boulevard itself constitutes a major redevelopment planning determinant. This street provides the most viable linkage between the BART/Junipero Serra convergence, the Junipero Serra strip and the Mission Street corridor at the "Top of the Hill". Had the RPA boundaries included the John Daly Boulevard and BART Station areas it might have been possible to bring the redevelopment process to bear on the formation of a vital commercial linkage between the two commercial assets. This type of development could unify the presently disparate Junipero Serra and Mission Street areas and go a long ways towards the establishment of a viable and identifiable central business district.



Illustration G - JOHN DALY BOULEVARD (AT BART)



Illustration H - JOHN DALY BOULEVARD (AT MISSION ST.)

Another serious constraint caused by the boundary configuration is the limiting of the RPA to the frontage areas immediately contiguous to the Mission Street and Junipero Serra right-of-ways. In general, the boundary is located approximately one half block either side of the respective streets. The narrowness of these boundaries preclude, in many instances, the assembly of land parcels of sufficient size to meet the requirements of contemporary commercial development.

In addition, the narrowness of the boundaries tend to reinforce the presently existing and undesirable corridor nature of the two redevelopment parcels. A practical consequence of commercial strips such as these, is that traffic is directed through the area rather than to it, resulting in a loss of commercial vitality.

SECTION V

LOT PATTERNS

An essential element in the redevelopment planning process is the assemblage of land into parcels of sufficient size and configuration to conform to the requirements of contemporary use. This assembly process is generally required because land within deteriorating urban areas is typically subdivided into parcels too small for contemporary commercial development packages. This is due to either previous small volume commercial usages or conversion of residential properties to commercial use.

Daly City is not an exception to this phenomena. In fact, due to the original residential use of most of the RPA, the lots are quite small and narrow. Inspection of the ownership patterns in the RPA reveals few large assemblages of contiguous parcels under one ownership. For example, the block on the southwest corner of the Mission Street/John Daly Boulevard intersection, which is an intensive commercial area, has lot widths varying from 25 to 32.5 feet inclusive. These lots vary in area from approximately 2800 square feet to approximately 3800 square feet. Such lots are quite small by the standards required for modern commercial usage. In addition to the generally inadequate size of the existing lots, their configuration is often irregular due to poorly designed street patterns in certain areas.

In summary, the existing lot patterns within the RPA are in general of inadequate size and improper form for contemporary usefulness. High priority must be given this condition during the redevelopment planning process.

SECTION VI

LAND USE

Land use is simply the categorizing of the useage of individual parcels into convenient groupings. Although these use categories may vary somewhat due to local or programmatic conditions, they generally consist of the appropriate subdivisions of residential, business or commercial, industrial, public and quasi-public or institutional, agriculture and/or mining and vacant land.

The land uses within the RPA are a thorough mixture of various intensities of commercial, residential, industrial, and public uses. These include single and multi-family residences, retail stores, offices, a building materials outlet served by a railroad spur, automobile sales and service facilities, motels, trailer parks, restaurants, and mortuaries as well as schools and other institutional uses. Quite often these uses are inappropriately juxtaposed to the detriment of all concerned.



Illustration I - MIXED LAND USE



Illustration J - MIXED LAND USE

In the recent past planning theory held that almost total segregation of individual land uses was the most appropriate arrangement for a community. This theory was implemented as a legitimate effort toward resolving the majority of community's planning problems. Experience has shown, however, that total separation of land use has produced a certain sterility due to the lack of vital interaction between compatible land uses.

Current practice attempts to mix compatible uses in an environmentally and economically beneficial manner. An obviously appropriate mix of uses is illustrated by the residential neighborhood served by convenient commercial centers, schools, libraries, etc. all contained within its boundaries.

One measure of appropriate use mix is economic. In commercial areas it is relatively easy to determine which type of businesses support or otherwise enhance one another. One determinant is the type and frequency of consumer traffic generated by the various businesses. For example a motel or trailer park generates low volume and frequency traffic, while a market generates high volume and frequency consumer traffic. These two types of which as a matter of fact exist side by side in the Daly City RPA, are of minor benefit to one another. There is little opportunity for a motel to benefit from the patronage of a market and visa versa.



Illustration K - MIXED LAND USE

In addition, to customer traffic, another consideration, in determining commercial mix, is the degree of similarity of the service offered. For example, the illustration shows an automobile sales facility in immediate relationship with the motel and market. Again, there is little functional compatibility in this mix of uses.

The compatibility of the existing uses on Junipero Serra Boulevard is highly questionable. There is a wide variety of uses including, service stations, restaurants, animal care, auto repair and parts, equipment rentals, furniture stores, boat sales, building material sales, a mortuary and a single family residence.



Illustration L - MIXED LAND USE

Inefficient land utilization in the RPA is illustrated by the large amount of land occupied by the Junipero Serra railroad spur. This spur provides very limited service while occupying a 2600 foot strip averaging approximately 100 feet in width. Seldom can a community with limited developable land afford this type of land utilization inefficiency.



Illustration M - RAILROAD SPUR

There is scattered vacant land within the RPA boundaries. Those parcels that are vacant tend to be small and of limited potential for development use without further assemblage.

In summary, the RPA contains a wide mix of land use. It appears that these uses have grown with little or no direction and that they, in many instances, represent an unbeneficial mix. The railroad spur along the Junipero Serra corridor no longer provides substantial benefit, in that the majority of the uses on this corridor no longer use any rail service. The major land use problems within the RPA consist in the main, not of mixed land use, but rather inappropriately mixed land use.

SECTION VII

HOUSING

The residential usage within the RPA is predominately contained within apartments both in conjunction with a commercial use or in separate apartment buildings. There are approximately one hundred six total such multi-family units within the RPA. The apartments that exist in conjunction with a business use are generally of the type whereby the dwelling use is located over a commercial establishment.

In addition to the multi-family housing, there are approximately twenty single family residences located in the RPA. Only one of these is located in Parcel Two (the Junipero Serra corridor).

The physical condition of the housing stock has been surveyed. The results of this survey are contained in the several volume report entitled "Schematic Building Conditions Survey". It is interesting to note however that the majority of housing within the RPA is of prewar vintage the value of which is presently undetermined.

SECTION VIII

POPULATION

In that the RPA is predominately commercial, there is presently limited population impact. The areas immediately surrounding the RPA do, however, exhibit significant population characteristics, particularly in Census Tract 6006 and 6007.

Census Tract 6006 has 8.6% of total family units with incomes below the 1969 national poverty level (\$3,743) and Tract 6007 has 6.8%. The median incomes for Tracts 6006 and 6007 are \$10,991 and \$9,857 respectively. This may be compared to the city median income of \$12,229 and the San Mateo County median income of \$13,863.

In Daly City as a whole, the growth rate is presently around four percent. This is in contrast with the 11.4% average rate between 1950 and 1960. The population has a median age 20-29 and an aged-child ratio between 15%-30%. The proportion of residents forty five and over is increasing while the quantity of very young children is decreasing.

There has been a significant increase in minority population for the past ten to fifteen years. This rapid increase has required the community to take steps to make these newcomers an integral and viable part of the community as a whole.

SECTION IX

PUBLIC FACILITIES/RECREATION/OPENSOURCE

There is a sparse mix of public or quasi-public facilities within the RPA. These include the Daly City War Memorial Community Center, the Daly City Parks and Recreation Department, two U.S. Post Offices, the Chamber of Commerce, the San Mateo County Legal Aid Society, the Community Service Center, the Guadalupe Health Center, John Daly Public Library and Fire Station 2 (at Parkview and Santa Barbara). Adjoining Parcel One is Jefferson Union High School and adjoining Parcel Two is Marchbank Park.

There are no active public recreation facilities within the RPA other than the Daly City War Memorial Community Center. This is also the largest public open space.



Illustration N - DALY CITY WAR MEMORIAL COMMUNITY CENTER

Marchbank Park and Jefferson Union High School, which adjoin the RPA provide the only other public open space with recreation facilities presently capable of serving the RPA.



Illustration O - JEFFERSON UNION HIGH SCHOOL
AS SEEN FROM MISSION STREET

SECTION X

MUNICIPAL CAPABILITIES AND FUNDING OPPORTUNITIES

The action oriented nature of a redevelopment program makes heavy demands on community staffing resources. The successful implementation of such a program requires the continued attention of redevelopment specialists.

The implication of this fact suggests that Daly City will be required to increase its existing staff in that present Daly City staff capabilities appear to be fully utilized. The alternative to an increase in staff is the utilization of outside consultants or by decreasing municipal services in other areas. Such staffing issues will be the subject of ELEMENT VII IMPLEMENTATION POLICIES AND MANAGEMENT RECOMMENDATIONS section of the DASA work effort.

The present decreased participation of the Federal Government in the redevelopment process is a serious impediment to any redevelopment program. This forces reliance on State law programs (tax increment) and other relatively slow response resources. The impact of this problem is, of course, the lengthening of the time required to accomplish redevelopment aims. This problem will also be the subject of the above mentioned ELEMENT VII.

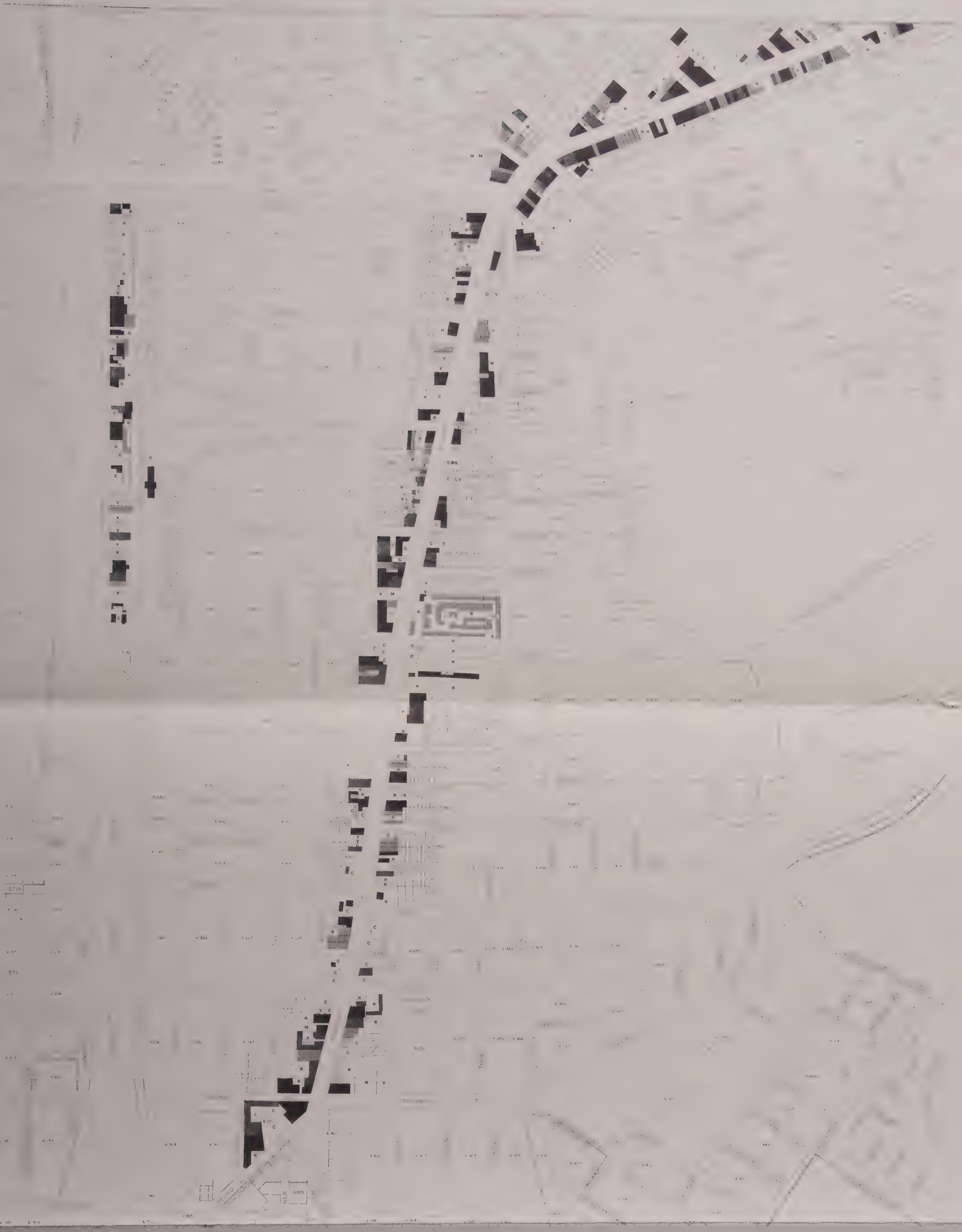
SECTION XI
BUILDING CONDITIONS/PROPERTY VALUES

A survey of all buildings within the RPA has been completed. This survey, entitled "Schematic Building Conditions Survey", (see Illustration P) examined buildings to determine their overall condition.

The results of the survey enabled all buildings to be classified within one of four categories. These categories are identified as (1) "Sound Structure", (2) "Deficient: Conservation Feasible", (3) "Deficient: Conservation Questionable", and (4) "Substandard". Individual buildings were placed in this category on the basis of the ratio between the cost of rehabilitating the building to first rate condition and the replacement value.



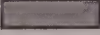
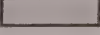


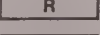
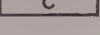
Although there are buildings in all four categories, the majority of structures lie within the two middle categories. That is either "Deficient: Conservation Feasible" or "Deficient: Conservation Questionable". An active rehabilitation program must consider the results of this survey and carefully evaluate its implications before establishing finalized aims.

The economic value for every property in the RPA has been assessed and grouped into categories. (see Illustration Q: Property Values Map and DIVISION A: SOCIO-ECONOMIC REPORT of this ELEMENT I).



0 1 2 3 4 500ft
February - 1976

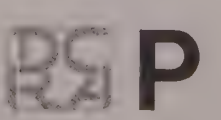
LEGEND

-  sound structure
-  deficient: conservation feasible
-  deficient: conservation questionable
-  substandard
-  vacant land
-  parking: municipal
-  parking: restricted
-  parking: appurtenant to commercial use

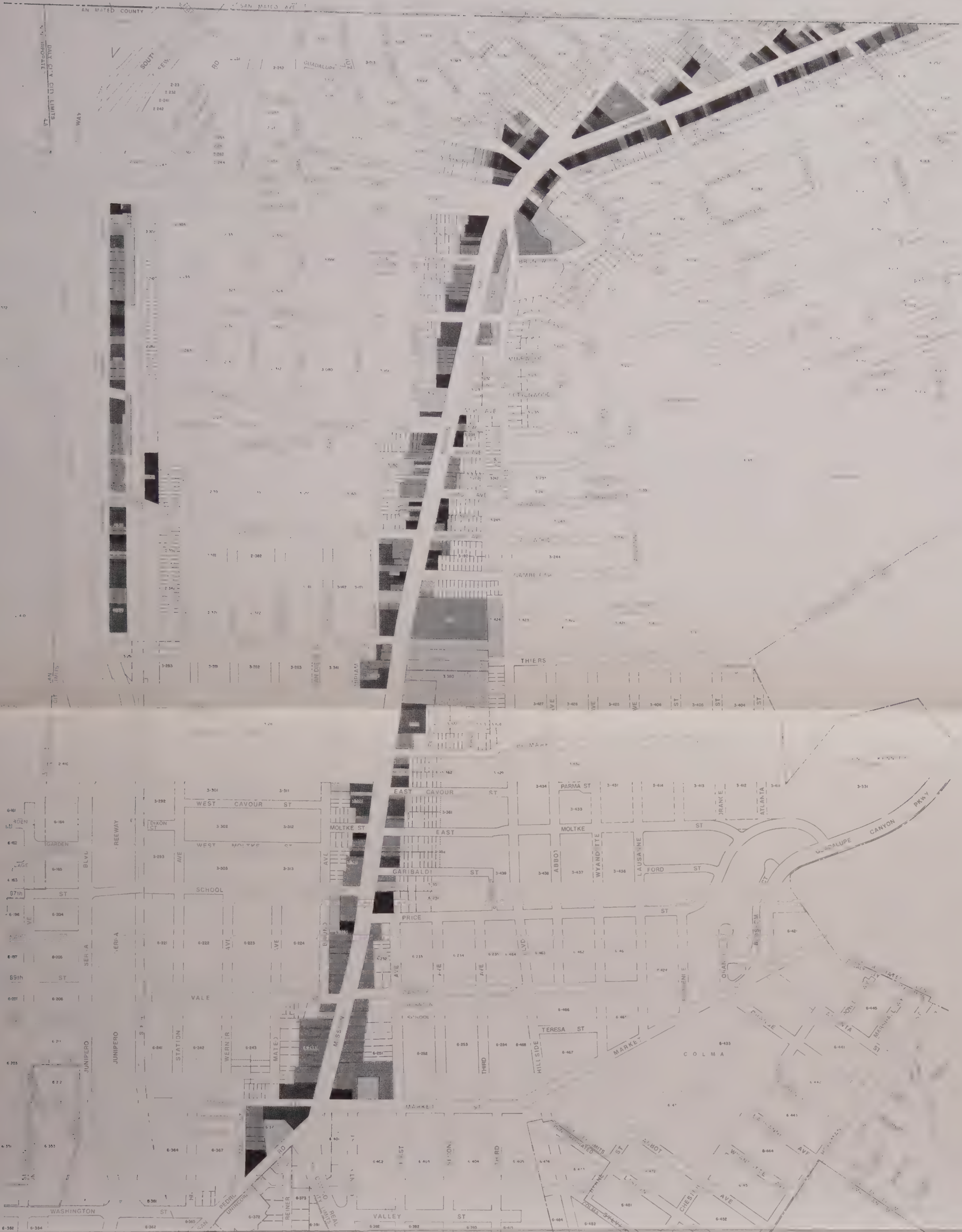
BUILDING CONDITIONS

DALY CITY REDEVELOPMENT PROJECT
REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

PREPARED BY



DASA A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER



LEGEND

- \$3.99 & under (per sq. ft.) •
- \$4.00 to \$7.99
- \$8.00 to \$11.99
- \$12.00 & over

Note: information shown on this map compiled from San Mateo Co. records

• values shown are for land per improvements and have been estimated at four (4) times assessed value.



0 1 2 3 4 500ft
March - 1976

PROPERTY VALUES

DALY CITY REDEVELOPMENT PROJECT

REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA

A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER

PREPARED BY **Q**

ELEMENT I

MAY 1976

**EXISTING CONDITIONS
PROBLEM IDENTIFICATION**

SECTION C

AUTHOR: WILBUR SMITH & ASSOCIATES

CIRCULATION / TRANSPORTATION

DALY CITY

REDEVELOPMENT PROJECT

PREPARED BY: THE DASA JOINT VENTURE

**D'Amico & Associates, Inc., Senior Joint Venture Partner
Albert R. Seyranian, AIA, Architect & Assoc., Jr. Joint Venture Partner**

**PREPARED FOR: THE REDEVELOPMENT AGENCY OF THE CITY
OF DALY CITY**

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0 1 2 3 4 500ft
December - 1975

PROJECT AREA BOUNDARY MAP

DALY CITY REDEVELOPMENT PROJECT

REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER

PREPARED BY



Section I

INTRODUCTION AND TRANSPORTATION OVERVIEW

This report provides a general review of existing traffic and parking conditions in the Redevelopment Project Area (hereafter referred to as RPA) and environs. The purpose is to identify locations and/or areas of deficiencies in the circulation element so that they may be addressed in the formulation of a recommended plan for the Daly City RPA.

DATA COLLECTION

We wish to acknowledge the assistance of the Daly City Redevelopment Agency and the Daly City Departments of Planning and Public Works in undertaking data collection, tabulation and graphics.

Specifically, an inventory of existing parking supply was undertaken in 1975 as well as recordings of usage on a composite weekday. The results of these tasks are shown in Figures C, D, and E.

Twenty-four hour traffic volume counts were made at key locations throughout the RPA and environs as were manual recordings of vehicle and pedestrian counts at major intersections at various times of day.

CIRCULATION AND ACCESS

The RPA is located adjacent to Mission Street, San Jose Avenue, San Pedro Road, East Market Street and Junipero Serra Boulevard which are 4-6 lane arterial streets. Circulation between the Junipero Serra and Mission project areas is possible via John Daly Boulevard, Westlake Avenue and School Street; the latter provides two traffic lanes whereas John Daly is a four lane divided facility with additional turn lanes at intersections.

Access to the RPA is provided by the north-south arterials of Mission-El Camino Real, San Jose Avenue and Junipero Serra Boulevard; in an east-west direction the primary

arterials are John Daly-Alemaný Boulevard, 87th Avenue-School Street, Washington Street and Eastmoor-San Pedro Avenues-East Market Street.

Freeway access is provided by the Junipero Serra and Southern facilities with connections at John Daly and Junipero Serra Boulevards, Washington Street and San Jose Avenue.

Figure A depicts the principal routes, and the number of traffic lanes, in the RPA.

TRAFFIC CONTROL

There are six signalized intersections in the RPA along Mission and at Junipero Serra at John Daly. Four-way stops (with flashing light) are located on Mission at Crocker and Templeton.

All traffic signals are under the jurisdiction of the California Department of Transportation. The type of controllers at each intersection are as follows:

Fully Traffic Actuated

Junipero Serra at John Daly
Mission at School
Mission at Market

Semi-Traffic Actuated

Mission at Bismark (connected to signal at
school Street

Fixed Time




Mission at John Daly-San Jose (110-second
cycle in peak periods, 90-second cycle in
off-peak periods)

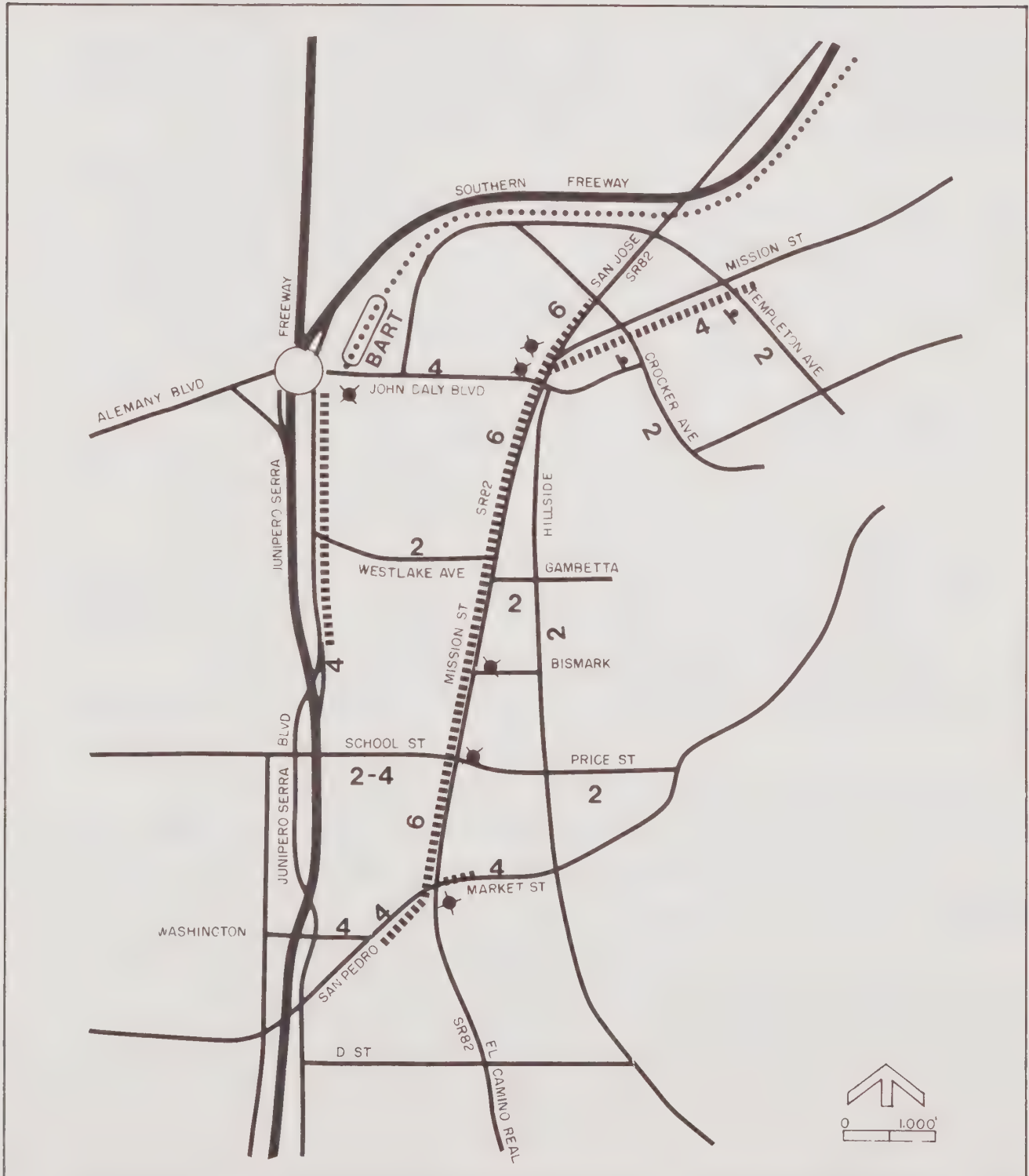
A description of the type of controllers follows:

A fully traffic actuated signal responds to the presence of traffic; for example, if a vehicle is not detected awaiting a particular phase or movement, no green time is allotted.

FIGURE A
PRINCIPAL TRANSPORTATION ROUTES

LEGEND

-  FOUR WAY STOP
-  TRAFFIC SIGNAL
- 4** NUMBER OF TRAFFIC LANES
-  PROJECT AREAS
(GENERALIZED LOCATION)



A semi-actuated signal stays green for the major movement unless there is a "call" (by a vehicle or pedestrian) for another movement.

A fixed time signal goes through pre-established phases and "green" times regardless of the presence or absence of traffic. For example, a "green indicator" would come on even though there may not be any vehicles or pedestrians waiting.

Actuated signals are more efficient in moving traffic.

PUBLIC TRANSPORTATION

The Bay Area Rapid Transit system serves the RPA, on weekdays between 6:00 a.m. and midnight, with a station located at John Daly and Junipero Serra Boulevards. A study in November, 1973 indicated that approximately 25 percent (358 of 1,397) of the park and ride BART patrons were from Daly City.

The BART station parking supply is currently being enlarged to 1,576 spaces from 788 with changes being made in the station access streets as well.

Service between San Francisco and Daly City is provided by the San Francisco Municipal Railway (MUNI) via Mission Street to San Jose Avenue; service is also provided between the BART Station and Stonestown Shopping Center.

MUNI provides service along Mission Street to San Jose Avenue at approximately 2 minute intervals in the peak and 4 minute intervals in the mid-day period.

A survey conducted in the Spring of 1975 indicated that approximately 1,730 persons boarded the MUNI vehicles during a 24 hour period on Mission between San Jose Avenue and the County line. It is expected that a comparable volume of patrons got off the vehicles in the same limits.

Northgate Transit provides service along Mission Street and also Junipero Serra Boulevard at 30-minute intervals during the day. Patronage figures are not known but observations

indicate an availability of seats.

Transit service between the Daly City BART Station and other communities is also provided through the RPA but stops are not permitted.

Section II

EVALUATION OF TRAFFIC AND PARKING

This chapter contains an evaluation of existing conditions relating to traffic, roadway capacity, parking supply and utilization.

TRAFFIC VOLUMES (24 Hour)

Current traffic volumes on the major arterials are listed in Table 1. Generally speaking, these volumes are within the normal capacity of an arterial street having the number of traffic lanes as in the RPA. However, the principal intersections are not typical as they often have more than four approaches, have skewed approaches and, therefore, require special signalization to adequately provide for the numerous conflicting traffic movements. These conditions tend to cause some congestion during the peak periods.

The RPA along Mission Street is also characterized by off-set or staggered intersections which complicates cross traffic movement and traffic control.

Junipero Serra Boulevard southerly of John Daly Boulevard, accommodates nearly 23,000 vehicles per day of which two-thirds (15,336) is northbound due to the ramp location with I-280. All other routes have nearly a balanced daily flow in each direction.

On Mission near Market, the 5:00 p.m. to 6:00 p.m. peak hour flow in the southbound direction represented 11 percent of the 24-hour directional volume as compared to 8.5 percent for northbound traffic occurring between 4:00 p.m. to 5:00 p.m. The volumes on Mission near Crocker are less peaked as indicated by the 8.4 and 8.5 percent in the peak period for northbound and southbound traffic, respectively.

Junipero Serra Boulevard northbound traffic flow has distinct peaks in the morning (9.4 percent) and evening 8.2 percent while the southbound flow builds to a peak volume between 5:00 p.m. and 6:00 p.m. representing 12.9 percent of the 24 hour volume.

Table 1
DAILY TRAFFIC VOLUMES

<u>ROUTE</u>	<u>LOCATION</u>	<u>DIRECTION</u>	<u>No. LANES</u>	<u>24 HOUR VOLUMES</u>	<u>DATE</u>
Mission Street	Castle-East Market	SB	3	10,226	1-5,6-76
" "	" " "	NB	3	12,297	12-11,12-75
TOTAL				22,523	
Mission Street	Wellington-Crocker	NB	2	6,079	1-5,6-76
" "	" " "	SB	2	6,565	12-18,19-75
TOTAL				12,644	
John Daly Blvd.	Santa Barbara-Mirian	EB	2	4,118	1-13,14-76
" "	" " "	WB	2	4,840	1-13,14-76
TOTAL				8,958	
Junipero Serrra Blvd.	Parkview-John Daly	NB	2	15,336	1-8,9-76
" " "	" " "	SB	2	7,439	1-8,9-76
TOTAL				22,775	
Guadalupe Canyon Pkwy	East of Orange Street	EB	2	2,364	1-12,13-76
" " "	" " " "	WB	2	2,856	1-12,13-76
TOTAL				5,220	
San Jose Avenue	North of Mission	NB-SB	6	14,900	1974
I-280	School Street	NB-SB	10	115,000	1974
Crocker Avenue	Irvington-Mission	WB	1	1,793	12-17,18-75
" "	" "	EB	1	2,154	
TOTAL				3,947	
Templeton Avenue	Mission-Irvington	EB-WB	2	2,837	1-6,7-76

The peak traffic period on John Daly Boulevard is the same for both directions, 7:00 a.m. to 8:00 a.m. and 4:00 p.m. to 5:00 p.m., with the latter period slightly higher at 9.5 percent.

Traffic flow on Crocker and Templeton is minor (less than 400 vehicles per hour in both directions) and is relatively uniform throughout the day.

APPROXIMATE INTERSECTION VOLUME - CAPACITY RELATIONSHIP

The Daly City Department of Public Works provided traffic turning movement and pedestrian volumes at key intersections in the RPA and environs. These counts ranged in duration from two to six hours, depending upon location, the two-hour counts included the two-hour peak period in either the a.m. or p.m. and the six-hour counts included the a.m. and p.m. peak periods plus midday counts.

The results of the data evaluation is summarized in Table 2. A brief explanation of the method of presentation follows.

Volume-Capacity (VC) Ratios - This is an expression of the relationship of the traffic volumes to the "design" capacity of the intersection. (Design capacity is also referred to as level of service C which means that the motorist is usually able to get through an intersection on the first "green" phase.) The VC ratio was developed based upon the critical flow method of analysis which considers the traffic volumes, number and use of traffic lanes and the resulting number of conflicting vehicle movements per lane which can not be made simultaneously. This method provides a check on the number and use of traffic lanes. (Signal timing and phasing are not used in this type of analysis). In locations where the number of pedestrian crossings were substantial (100 or more per hour per intersection approach) the VC ratio was increased by approximately 10 percent.

Midday Traffic Relationship - The relationship of the number of vehicles approaching an intersection during off-peak

Table 2

SUMMARY OF INTERSECTION TRAFFIC CONDITIONS

<u>INTERSECTION</u>	<u>VOLUME-CAPACITY</u> <u>RATIO^{1/}</u>		<u>MIDDAY</u> <u>TRAFFIC</u> <u>RELATIONSHIP</u> <u>TO PEAK</u> (Percent)	<u>MAXIMUM</u> <u>HOURLY</u> <u>PEDESTRIAN</u> <u>VOLUME</u>	<u>TRAFFIC</u> <u>CONTROL</u> <u>DEVICE</u>
	<u>AM</u> <u>Peak</u>	<u>PM</u> <u>Peak</u>			
San Jose @ Flournoy	0.33	0.24	65	78 (5-6)	Arterial Stop
Hillside @ East Vista	-	0.49	89 (4-5)	68 (4-5)	-
Hillside @ Price	-	0.42	88 (4-5)	48 (5-6)	Arterial Stop
Hillside @ Bismark	-	0.43	-	59 (4-5)	Four Way Stop
Hillside @ East Market	0.62	0.77	51	234 (7:30- 8:30)	Signal
Mission @ Templeton- Liebig	-	0.31	86 (2-3)	315 (5-6)	Four Way Stop
Mission @ Crocker- Flournoy	-	0.43	85 (2-3)	129 (2-3, 4-5)	Four Way Stop
Mission @ San Jose- Bepler	0.73	0.80	78 (2-3)	619 (5-6)	Signal
Mission @ John Daly- Hillside	0.73	0.73	80 (2-3)	194 (5-6)	Signal
Mission @ Westlake	-	0.45	77 (2-3)	206 (2-3)	Arterial Stop
Mission @ Vista Grande	-	0.47	76 (2-3)	207 (2-3)	Arterial Stop
Mission @ Market	-	0.83	78 (2-3)	125 (2-3)	Signal
Junipero Serra @ John Daly	0.87	1.20	60 (2-3)	255 (5-6)	Signal
Junipero Serra @ North Parkview	0.56	0.60	88 (2-3)	21 (2-3)	Arterial Stop
Junipero Serra @ West- lake	0.82	0.64	62 (2-3)	4 (8-9)	Arterial Stop
Junipero Serra @ School	0.56	-	66 (2-3)	76 (2-3)	Signal

^{1/} Based upon level of service C (design capacity).

to peak hour conditions is expressed as a percentage. This is not necessarily the relationship to the VC ratio as the through and/or turning movement volumes may not be in the same proportion.

Maximum Hourly Pedestrian Volumes - This is the sum of all pedestrian crossings of the intersection approaches.

Traffic Control Devices - The type of traffic control device at the intersection is indicated in this column. Arterial stop means that the minor street traffic must stop and the major street traffic has the right-of-way.

VOLUME-CAPACITY RATIO

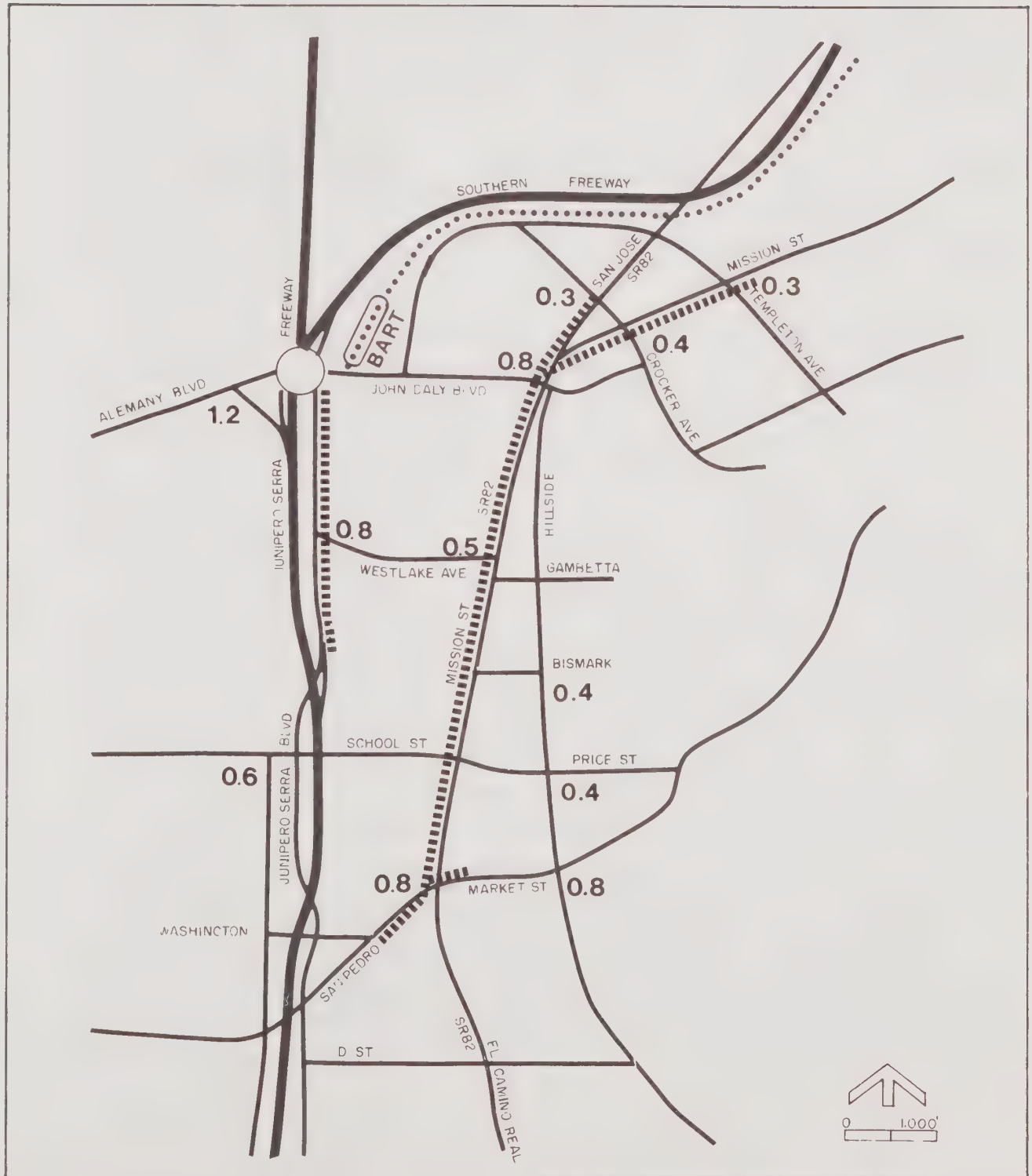
The volume-capacity ratio at intersections on the major routes are as follows:

Junipero Serra Boulevard - The highest VC ratio occurs at the Junipero Serra-John Daly intersection where a value of 1.2 of design capacity was computed. Proceeding southerly along Junipero Serra Boulevard, the values are 0.6, 0.8 and 0.6 at the intersections with North Parkview, Westlake and 87th-School.

Intersecting street volumes are 80-120 on Parkview and Westlake as compared to approximately 450 on School Street. During the a.m. peak period on Junipero Serra, in the Parkview-Westlake area, the northbound volume represents 83 percent of the north-south intersection approach traffic as compared to 58 percent in the p.m. peak hour. This may be attributed to the off-ramp from the freeway northerly of School Street which serves motorists on the Junipero Serra Freeway destined to the BART station and environs.

Mission Street - Intersections at San Jose, John Daly and Market-San Pedro were recorded to be operating at approximately 80 percent of design capacity (level of service C) during the peak period. Other major intersections accommodated volumes in the 30-50 percent range of design capacity. This low value is attributed to the relatively small volume of traffic on the cross streets of Templeton-Liebig, Flournoy-Crocker, Vista Grande, and Westlake. Figure B indicates the approximate volume-capacity ratio at key intersections.

1.0 OR GREATER = CAPACITY EXCEEDED
PROJECT AREAS (GENERALIZED LOCATION)



Hillside Boulevard - The highest volume-capacity ratio (0.8) occurs at the intersections of Mission and East Market Streets. The intersections of Bismark, Price and Vista were recorded to be in the 40-50 percent of design capacity range.

MIDDAY TRAFFIC

As seen in Table 2, the relationship of midday to peak period traffic at the intersections is in the 50-89 percent range. This comparison tends to indicate that reserve capacity should exist during the off-peak periods as compared to peak periods.

TRAFFIC ACCIDENTS

Accident summary records maintained by the City were reviewed for 1974. Locations where there were more than five accidents are shown in Table 3 as is the type of accident and contributing cause.

Eight intersections had 114 reported accidents of which 43 (38 percent) occurred along Mission-San Jose between Bepler and John Daly which reinforces the opinion that this area is complex from a traffic viewpoint.

The intersection of John Daly and Junipero Serra Boulevards was the location of 16 reported accidents and 18 accidents were reported at the Mission and Market Streets area.

Thirty-one percent of the accidents involved hitting a fixed object (island, pole, etc.) or a parked vehicle while 30 percent were rear-end collisions. Twenty percent of the accidents were classified as broadside, 8 percent sideswipe and 6 percent involved a pedestrian or bicycle.

The cause of accident is subject to the judgement of the officer; "inattention" and "other"; each were listed as the contributing cause for 29 percent of the accidents. "Following to close" and "failure to yield right-of-way" were listed as the cause of 3 and 7 percent of the accidents, respectively. This is a low percentage considering that "rear-end collisions" represented 30 percent and "broadside" 20 percent of the total number of accidents.

Table 3

ACCIDENT LOCATION, TYPE AND CONTRIBUTING CAUSE
Daly City Redevelopment Areas

INTERSECTION ACCIDENTS-1974-TYPE ACCIDENT

<u>INTERSECTION</u>	<u>TYPE</u> <u>CONTROL</u>	<u>Fixed Object</u>			<u>Ped- Side-</u>			<u>TOTAL</u>	<u>PERCENT</u>
		<u>Rearend</u>	<u>Broadside</u>	<u>Or</u> <u>Parked Vehicle</u>	<u>Bike</u>	<u>Swiped</u>	<u>Other</u>		
John Daly @ Junipero Serra	Signal	6	3	-	-	6	1	16	14
Mission @ Market	Signal	5	3	7	1	-	2	18	16
Mission @ School	Signal	3	2	-	1	1	1	8	7
Mission @ Moltke	Side- Street Stop	3	2	2	2	1	-	10	9
Mission @ Gambetta	"Stop"	3	-	3	-	-	-	5	6
Hillcrest @ Mission	Signal	7	5	12	1	-	2	27	24
John Daly @ Mission	Signal	7	3	4	1	1	-	16	14
Mission @ Templeton-Liebig	Signal	-	5	7	1	-	-	13	11
TOTAL		34	23	35	7	9	6	114	
Percent		30	20	31	6	8	5	100	100

CONTRIBUTING CAUSE

<u>INTERSECTION</u>	<u>Inattention</u>	<u>Unfamiliar</u>	<u>Defective</u> <u>Vehicle</u>	<u>Following</u> <u>Too Close</u>	<u>Improper</u>	<u>Under</u> <u>Influence</u>	<u>Other</u>	<u>Failed</u>		<u>Speed</u>
					<u>Turn/Parked</u> <u>Vehicle</u>			<u>To</u> <u>Yield R/W</u>		
John Daly @ Junipero Serra	7	2	1	1	1	2	2	1	-	
Mission @ Market	4	-	1	-	2	3	4	1	2	
Mission @ School	3	1	-	2	-	-	1	1	-	
Mission @ Moltke	4	-	-	-	1	1	2	1	1	
Mission @ Gambetta	3	-	-	-	-	-	2	-	-	
Hillcrest @ Mission	6	-	-	1	1	6	12	-	1	
John Daly @ Mission	5	-	-	-	1	3	5	2	1	
Mission @ Templeton- Liebig	<u>1</u>	<u>-</u>	<u>2</u>	<u>-</u>	<u>-</u>	<u>2</u>	<u>5</u>	<u>2</u>	<u>1</u>	
TOTAL	33	3	4	3	6	17	33	8	7	
Percent	29	3	3	3	5	15	29	7	6	

TRAVEL SPEED

Traffic was observed to flow at the speed limit of 35 miles per hour on most of Mission Street between John Daly and Market and on Junipero Serra southerly of John Daly. This may be attributed to the absence of frequent traffic control devices which, in turn, is related to the absence of cross traffic volumes warranting signals.

This free flowing movement is ideal for the through motorist but is an impediment to safe pedestrian traffic and local traffic as there is frequently a long wait for a "safe" gap in the arterial traffic flow.

BIKE LANES

The Daly City Bike Trails plan includes trails on Junipero Serra Boulevard south of the RPA and other routes westerly of the RPA.

Topography and traffic characteristics on the RPA arterial streets tend to discourage developing special facilities for cyclists on them.

PEDESTRIAN VOLUMES

The maximum hourly volume of pedestraings crossing all approaches at an intersection was recorded to be 619 at the Mission-San Jose-Beppler location followed by 315 at Mission-Templeton-Liebig. Third highest volume of pedestrain crossings (234) was at Hillside Boulevard and East Market Street which may be attributed to school related activity.

Total peak period pedestrain crossing activity at Hillside intersections (4) was 409; 1,795 at 7 locations on Mission and 356 at 4 locations on Junipero Serra Boulevard (70 percent of which was recorded at the Junipero Serra-John Daly Boulevard intersection).

Accidents involving pedestrians and/or bikes represented 6 percent (7) of the 114 accidents recorded at 8 RPA intersections. As shown in Table 3 the accidents occured at 6 locations. Pedestrian crossings of Mission and Junipero Serra Boulevard southerly of John Daly and at non-signalized intersections is a difficult activity due to the pavement

width, volume and speed of traffic. At some intersections the pedestrian phase and pavement width requires a quick pace which is difficult for some pedestrians.

PARKING SUPPLY SUMMARY

Parking within the RPA is provided in the categories as follows:

Curb - Approximately 1,920 spaces are provided along streets; time limits vary from 12 minutes to "unlimited" and approximately 475 spaces are controlled by meters and others (approximately 600) by posted time limits. Curb spaces on local streets adjacent to the arterial streets are primarily used for long term parking as most spaces have no time limit; however, time limits have been posted in some residential areas.

Parking along Junipero Serra Boulevard is parallel to the curb on the west side and primarily 90 degrees to the curb line on the east side; 90-degree parking is also delineated on Los Olivos Avenue (a cul de sac frontage-parking street) and other minor locations. (This type of parking provides the maximum number of spaces but it is a severe accident hazard on Junipero Serra Boulevard due to the volume of traffic.) Angle parking is located on sections of Hillcrest and Wellington which are low volume streets. On-street parking in the rest of the RPA is parallel to the curb.

Off-Street - Parking spaces are provided in two categories - municipal and private (restricted). Municipal parking is limited to permit holders; private parking is restricted to patrons and/or employees of a particular establishment.

Municipal facilities provide 100 spaces at five locations along Mission-San Jose and 54 spaces at one location at Marchbank Park near Junipero Serra Boulevard. These spaces were recently converted to "permit parking"; hence, they are intended to serve motorists employed in the area.

Private Parking is restricted to motorists destined to a particular development such as Bank of America and Matthews TV et al.

Ten facilities along Junipero Serra Boulevard provide 178 spaces; 22 facilities along Mission Street provide 577 spaces.

Private parking represents 27 percent of the parking supply.

PARKING SUPPLY AND UTILIZATION

Figures C and D depict the location, supply and restrictions applicable to curb and off-street parking in the RPA and environs. In order to facilitate evaluation of the RPA it was divided into 7 sub-areas of which 2 are on Junipero Serra.

To aid in understanding the significance of the comparison of parking supply and utilization the following is offered:

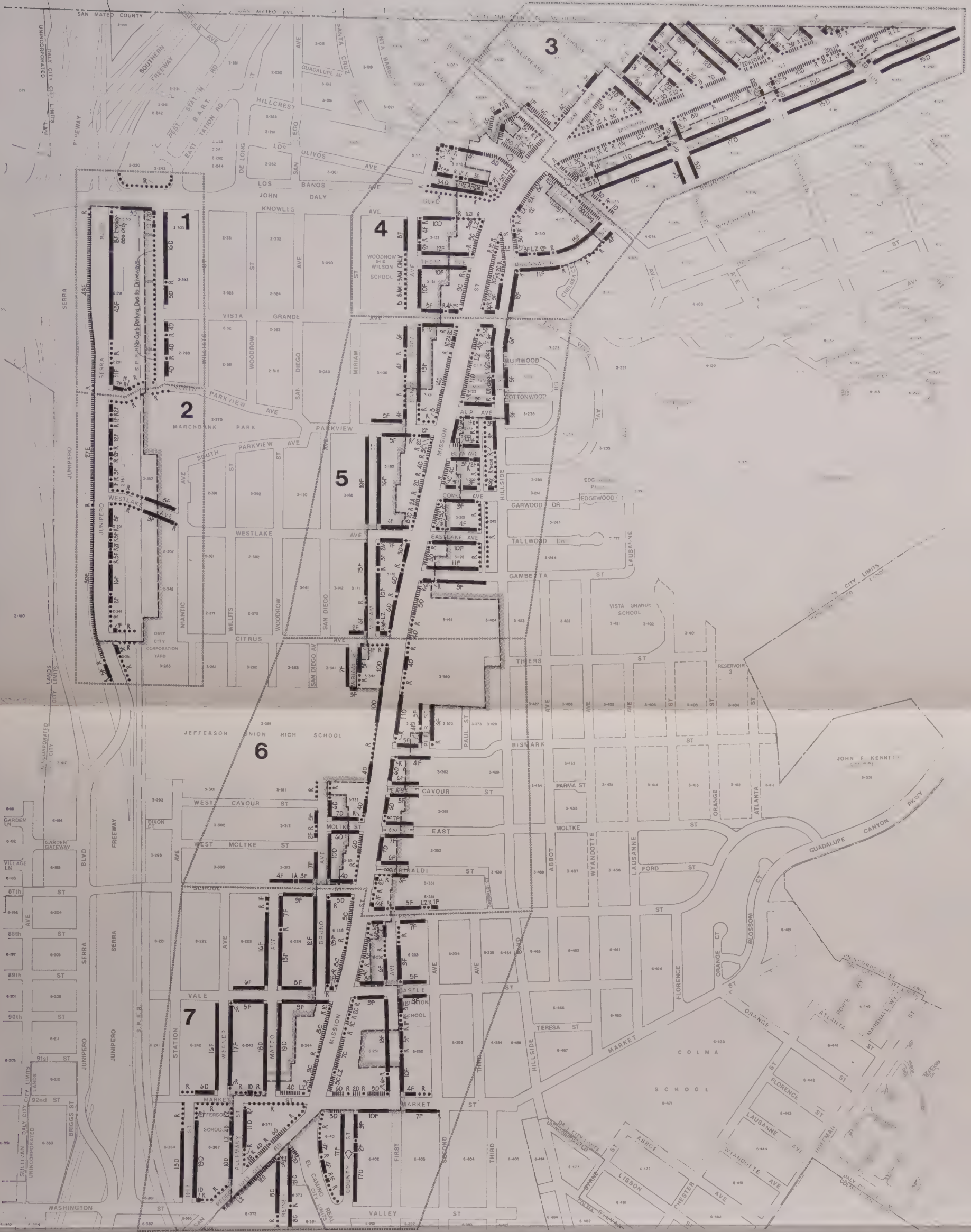
Practical capacity of public short term (2-3 hours) parking spaces (curb or off-street) is generally considered to be 85-90 percent of possible capacity; for long term public parking facilities the practical capacity is equal to supply. When the parking accumulation in the respective categories (short or long term) is below the practical capacity level, there is unused capacity.

For restricted (private) spaces the unused capacity is limited to increased activity at a specific development and is not available to meet increased demand of the general area, hence the practical capacity is equal to the vehicle accumulation.

Some of the more significant factors relating to parking supply and utilization in each sub-area is contained in the following subsections.

Junipero Serra Area - There are 515 parking spaces in this area of which 273 (53 percent) are within the public right-of-way. Of the 232 off-street spaces, 178 are "restricted" to motorists destined to a specific business.

On-street spaces on the west side of Junipero Serra are metered and parking is parallel to the curb. On the east side of the street, there is almost continuous 90-degree non-metered parking.



LEGEND

METERED	NON-METERED	RESTRICTED
A 12 min	A 12 min	R red zone
B 24 min	B 24 min	B bus zone
C 1 hour	C 1 hour	T taxi zone
D 2 hour	D 2 hour	LZ loading zone
E 4 hour	E 4 hour	
F 12 hour	F unlimited	Note: short red zones not shown

6-100 block number
6-100 project boundary
6 sub-area number



0 1 2 3 4 500ft
January-1976

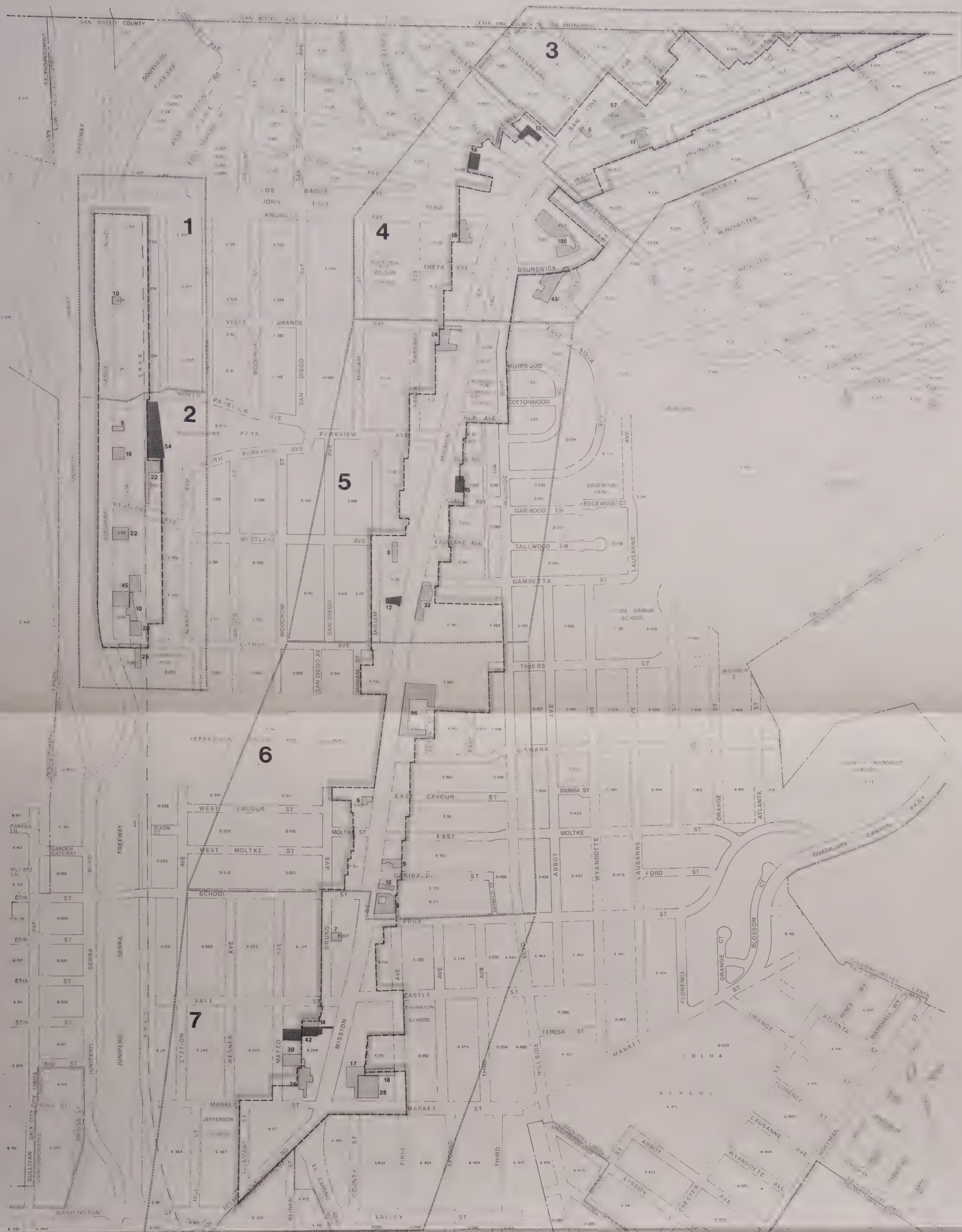
CURB PARKING

DALY CITY REDEVELOPMENT PROJECT

REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER

PREPARED BY **RSAC**



LEGEND

- municipal parking
- private restricted parking
- 45 no. of spaces available
- sub-area boundary
- 5 sub-area number
- project boundary



0 1 2 3 4 500ft
March - 1976

OFF-STREET PARKING

DALY CITY REDEVELOPMENT PROJECT
REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

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PREPARED BY **RS&D**

The 54-space municipal facility near Marchbank Park is the only municipal off-street facility.

Sub-area 1 (John Daly-Parkview) contains 142 spaces of which 132 are on-street spaces, while sub-area 2 (Parkview-Citrus) contains 373 spaces of which 151 are curb spaces.

Occupancy of the curb spaces in sub-areas 1 and 2 was recorded to be 58 and 32 percent, respectively. Five motorists were recorded to be parked in excess of the posted time limit.

The off-street facilities were recorded to be occupied to 100 (10 of 10) and 41 (91 of 222) percent of capacity in sub-areas 1 and 2, respectively.

Mission Street Area - There are approximately 2,315 spaces in this area of which 1,638 (71 percent) are curb spaces; municipal facilities provide 100 spaces (4 percent) and 577 spaces (25 percent) are in private facilities.

Sub-area 3 (Wellington-Bepler to north City Limits) contains 443 spaces; 361 are on-street spaces (342 with time limit) and 82 are located in private off-street facilities.

Vehicle accumulation represented 57 percent of capacity at the 342 curb spaces with time limit and 38 percent of capacity at the restricted spaces. Overtime parkers number 143 at time limit spaces between 10:00 a.m. and 6:00 p.m.

In sub-area 4 (Vista Grande-Wellington) 74 percent of the 172 time limit curb spaces were occupied during the peak period as compared to 76 percent (102 of 135) of the "no limit" curb spaces.

Parking in restricted off-street spaces represented 19 percent of capacity (30 of 161) and 97 percent (30 of 31) of capacity at municipal spaces. Overtime parkers numbered 115 at curb spaces and nine at municipal spaces.

Sub-area 5 (Citrus-Vista Grande) has 361 curb spaces of which 113 have a time limit. Spaces with a time limit were recorded to be 62 percent occupied during the peak period (44 overtime parkers during the day) and the "no limit" curb spaces were 63 percent occupied.

The 27 municipal spaces had a peak accumulation of 17 vehicles compared to 20 vehicles in the 64 restricted off-street spaces.

Sub-area 6 (School-Price to Citrus) has 101 "no limit" curb spaces and 101 with a time limit; vehicle accumulation represented 76 and 56 percent of capacity, respectively. Overtime parkers numbered 36 during the day.

The restricted off-street spaces were 48 percent occupied (62 of 130); there are no municipal spaces in sub-area 6.

Sub-area 7 (south boundary-School-Price) has 223 time limit and 184 "no limit" curb spaces; off-street spaces include 42 at municipal facilities and 140 restricted spaces.

Vehicle accumulation was recorded to be 57 percent of capacity at curb spaces; 93 overtime parkers were recorded at time limit curb spaces.

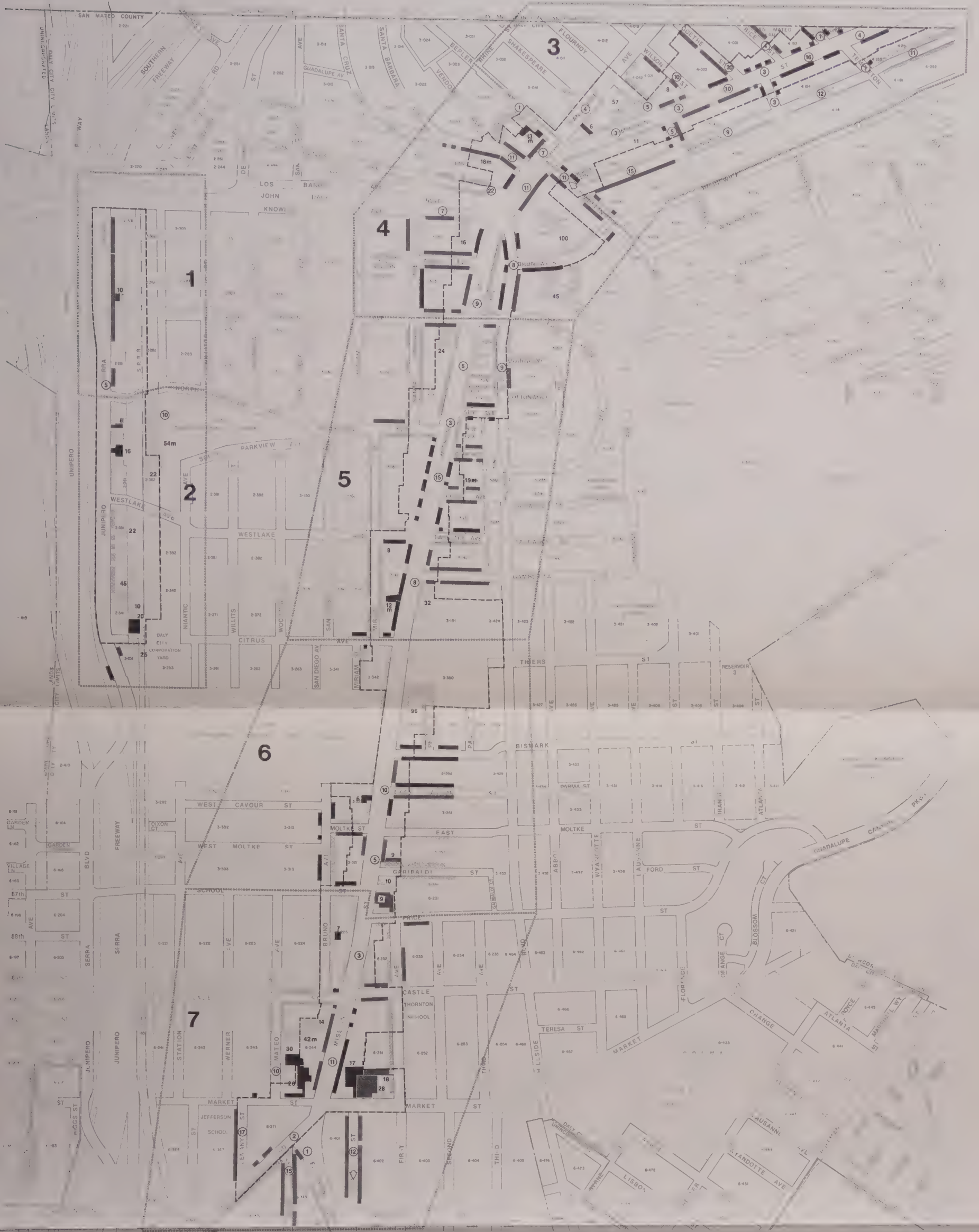
Municipal spaces were 21 percent occupied (4 overtime parkers) and the restricted spaces were 82 percent occupied.


Table 4 contains a listing of parking, supply and utilization throughout the day for each type parking and sub-area. Figure E illustrates parking characteristics in the RPA relative to peak period vehicle accumulation at each curb face (block) and off-street facility. The most significant concentrations of overtime parkers are also indicated.

VEHICLE ACCUMULATION PROFILE

The number of vehicles parked throughout the day does not fluctuate significantly. In the Junipero Serra area, the vehicle accumulation ranged from 40 percent of capacity in the 10:00 a.m. to 12:00 p.m. period to 42 percent in the 2:00 p.m. to 4:00 p.m. period. In the Mission Street area, the range was 49 to 53 percent of capacity in the 4:00 p.m. to 6:00 p.m. and 12:00 p.m. to 2:00 p.m. periods, respectively.

Table 4 indicates the number of vehicles recorded during various times of the day in each category of parking spaces and it is apparent that there are significant numbers of spaces available in each sub-area in most categories.





0 1 2 3 4 500ft
January 1976

LEGEND

PEAK OCCUPANCY (%)

90 or above

75 to 89

60 to 74

59 or less

no. of overtime parkers

spaces available (m=municipal)

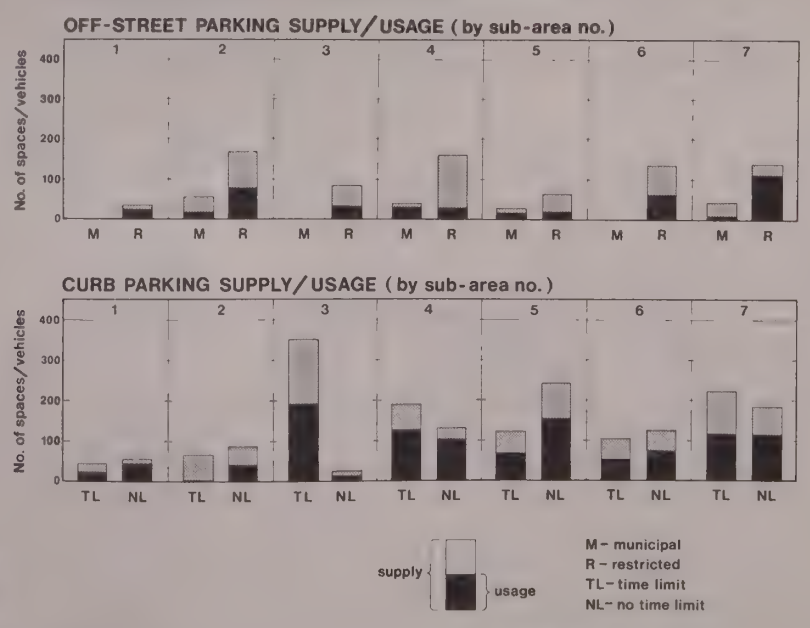
project limits

CURB

OFF-STREET

30m

PARKING SPACE UTILIZATION SUMMARY



PARKING CHARACTERISTICS

DALY CITY REDEVELOPMENT PROJECT

REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER


PREPARED BY 

Table 4

ESTIMATED PARKING SUPPLY-UTILIZATION SUMMARY
RPA and Applicable Environs

SUB- AREA	TYPE PARKING	NUMBER SPACES	ACCUMULATION DURING PERIOD OF				PERCENT OCCUPANCY	NUMBER OVERTIME PARKERS
			10-12	12-2	2-4	4-6		
1	<u>Curb</u>							
	Time Limit	52	13	18	24	12	35	5
	No Limit	80	54	56	53	56	70	
	<u>Off-Street</u>							
	Municipal	0	-	-	-	-	-	
	Restricted	10	9	10	10	9	100	
2	<u>Curb</u>							
	Time Limit	66	4	3	5	1	8	
	No Limit	85	33	37	43	42	50	
	<u>Off-Street</u>							
	Municipal	54	16	12	10	8	30	10
	Restricted	168	75	76	74	79	47	
Junipero Serra								
Area Total								
	<u>Curb</u>							
	Time Limit	118	17	21	29	13	25	5
	No Limit	165	87	93	96	98	59	
	<u>Off-Street</u>							
	Municipal	54	16	12	10	8	30	10
	Restricted	178	84	86	84	88	49	
	Sub-Total	515	204	212	219	207	43	15
3	<u>Curb</u>							
	Time Limit	342	186	170	194	193	57	143
	No Limit	19	14	14	13	12	74	
	<u>Off-Street</u>							
	Municipal	0	-	-	-	-	-	
	Restricted	82	31	29	24	38		
4	<u>Curb</u>							
	Time Limit	172	109	117	127	111	74	115
	No Limit	135	102	101	91	87	76	
	<u>Off-Street</u>							
	Municipal	31	27	28	30	27	97	9
	Restricted	161	27	30	7	5	19	
5	<u>Curb</u>							
	Time Limit	113	58	68	65	70	62	44
	No Limit	248	148	143	156	151	63	
	<u>Off-Street</u>							
	Municipal	27	11	10	17	16	63	4
	Restricted	64	14	20	15	12	31	
6	<u>Curb</u>							
	Time Limit	101	44	53	54	48	54	36
	No Limit	101	70	76	74	58	76	
	<u>Off-Street</u>							
	Municipal	0	-	-	-	-	-	
	Restricted	130	41	62	51	60	48	

Table 4
ESTIMATED PARKING SUPPLY-UTILIZATION SUMMARY
RPA and Applicable Environs
(Continued)

<u>SUB- AREA</u>	<u>TYPE PARKING</u>	<u>NUMBER SPACES</u>	<u>ACCUMULATION DURING PERIOD OF</u>				<u>PERCENT OCCUPANCY</u>	<u>NUMBER OVERTIME PARKERS</u>
			<u>10-12</u>	<u>12-2</u>	<u>2-4</u>	<u>4-6</u>		
7	<u>Curb</u>							
	Time Limit	223	118	118	112	107	53	93
	No Limit	184	116	106	109	103	63	
	<u>Off-Street</u>							
	Municipal	42	7	5	9	8	21	4
	Restricted	140	114	104	105	96	82	
Mission Street								
Area Total								
	<u>Curb</u>							
	Time Limit	951	487	498	514	501	56	427
	No Limit	687	450	440	443	411	64	
	<u>Off-Street</u>							
	Municipal	100	45	43	56	51	34	17
	Restricted	577	211	250	168	177	45	
	Sub-Total	2315	1193	1231	1181	1140	41	444

PARKING ACTIVITY

License number recordings were made at all municipal and curb spaces at one or two hour intervals between 10:00 a.m. and 6:00 p.m. This procedure provides an indication of the approximate number of vehicles using these spaces throughout the day. (Some motorists could park and unpark between periodic checks and not be recorded; hence, it is not indicative of the total number of parkers.)

In the Mission Street area, 2,244 vehicles were recorded in approximately 1,700 spaces (excluding restricted off-street) which results in a rate of 1.3 vehicles per space per day. In the Junipero Serra area, the rate was 0.8 (267 vehicles in approximately 330 spaces).

These rates are low and may be attributed to the large number of vacant spaces available throughout the day, the long parking duration of many motorists (as indicated by the number of overtime parkers) and the frequency of the checks.

The more active areas are located in sub-areas 3, 5, 6, and 7, where individual block faces had rates of 2.5-4.0 vehicles per space per day.

Section III

PROBLEM IDENTIFICATION

This section identifies existing conditions which should be addressed in the development of a circulation and parking improvement program which will support and enhance the RPA.

PARKING

The comparison of parking supply and vehicle accumulation in each sub-area indicates an overall availability of spaces. However, the utilization of time limit spaces in the Mission Street corridor indicates that many motorists tend to disregard the limits either by reason of convenience or necessity or both.

Sub-Area 3 - Approximately 30 percent of the motorists recorded at time limit spaces stayed in excess of the posted limit. The vehicle accumulation in the 342 spaces was recorded to be approximately 57 percent of capacity. There are 19 no limit spaces in this area and no municipal facilities.

Sub-Area 4 - Approximately 50 percent (116) of the motorists recorded at time limit spaces exceeded the time limit. Accumulation at time limit (172 spaces) and no limit (135) was approximately 74 and 76 percent, respectively.

Sub-Area 5 - Motorists exceeding the time limit represented approximately 23 percent (48) of those recorded at the spaces. There were approximately 92 no limit spaces available in the area during the period of maximum accumulation.

Sub-Area 6 - Thirty-six of approximately 108 motorists recorded at time limit spaces exceeded the time limit. The 101 time limit spaces were 54 percent occupied as compared to approximately 76 percent of the 101 no limit spaces.

Sub-Area 7 - Approximately 25 percent of the motorists recorded at the time limit spaces exceed the time limit; 53 percent (118 of 223) of the time limit and 63 percent (116 of 186) of the no limit spaces were occupied during the peak period.

The foregoing indicates the need to evaluate the appropriate time limits and location of existing curb spaces coupled with increased enforcement.

Some persons have indicated that they are not able to park in the municipal facilities even though they have a valid permit. This too is a condition that can be handled through enforcement.

The 90-degree parking adjacent to Junipero Serra Boulevard should be eliminated due to the accident potential created by impaired visibility, backing across two traffic lanes and speed. A supply of convenient and safe parking should be established.

TRAFFIC

The streets serving the north-south oriented RPA are major routes serving large volumes of through traffic as well as lesser volumes of motorists conducting business in the area. Consequently, future traffic increases may result from external as well as internal (project areas) sources.

Inasmuch as intersections are usually the limiting factor to urban arterial capacity, the following locations are critical to adequately accommodate future traffic (vehicle and pedestrian) increases.

- Junipero Serra and John Daly Boulevards
- Mission Street and San Pedro Road-Market Street
- Mission Street and John Daly Boulevard
- Mission Street and San Jose Avenue
- Hillside Boulevard and Market Street

The Mission Street area between John Daly and San Jose was the location of a substantial number of accidents - some of which could be prevented by simplifying the intersection geometrics and/or modifying the lane delineation.

PUBLIC TRANSPORTATION

This service will be improved through proposed projects by San Mateo County Transit and San Francisco Muni.

Proposals include making the Daly City BART station a terminal for new routes and route extensions.

ELEMENT I

MAY 1976

EXISTING CONDITIONS PROBLEM IDENTIFICATION

SECTION D

AUTHOR: D'AMICO & ASSOC., INC. / LEONARD SALLE, PE

ENGINEERING

DALY CITY

REDEVELOPMENT PROJECT

PREPARED BY: THE DASA JOINT VENTURE

**D'Amico & Associates, Inc., Senior Joint Venture Partner
Albert R. Seyranian, AIA, Architect & Assoc., Jr. Joint Venture Partner**

**PREPARED FOR: THE REDEVELOPMENT AGENCY OF THE CITY
OF DALY CITY**

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*Maps prepared by DCRA



0 1 2 3 4 500ft
December - 1975

PROJECT AREA BOUNDARY MAP

DALY CITY REDEVELOPMENT PROJECT

REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER

PREPARED BY



Section I

INTRODUCTION

The Redevelopment Project Area (RPA), generally, has utilities, public works facilities, and public services that can meet the needs of anticipated redevelopment with little modification. There are two primary reasons that such is the case; first, the RPA already has fairly intensive development and secondly, utilities, public works facilities, and public services have been well maintained and/or given good attention.

Of the two areas, the more significant redevelopment, particularly with respect to level of existing development, would probably occur in the Junipero Serra Boulevard corridor. As would then be anticipated, this portion of the RPA would more significantly impact existing facilities than the Mission Street Corridor.

It is not anticipated that the utility systems and public works facilities within the RPA will be significantly impacted by the construction of major redevelopment components or structures. For, the extensive development of these systems and facilities provides a high degree of flexibility in respect to major construction. For example, if the "Top of the Hill" area is turned into a plaza with underground parking or offices, that would necessitate a redesign of the utilities within the plaza area to accommodate the development. However, the utility systems and public works facilities adjacent to the plaza would still serve the plaza, i.e., the development would have ready access to existing systems and facilities.

Section II

DRAINAGE

TOPOGRAPHY

Mission Street is located close to the upper reaches of the watershed draining to and including Mission Street. Junipero Serra Boulevard within the RPA might be considered to be somewhat in the middle of the same watershed.

Hillcrest Drive intersects Mission Street at the high point of Mission. From Hillcrest south, the fall in topography along Mission is predominantly to the west, but well defined in the southerly direction as well. With respect to Mission, northeast of Hillcrest, the topography slopes essentially to the north. Mission slopes fairly uniformly from Hillcrest to Market; the average gradient being about three and one-half percent. Although the three and one-half percent gradient is a gentle slope, it represents a total difference of elevation, from Hillcrest to East Market, of over 200 feet.

The fall in topography along Junipero Serra Boulevard is essentially to the west and less well defined in the southerly direction.

EXISTING STORM DRAINAGE SYSTEM

The storm drainage system is somewhat undersized as it now exists. In the opinion of the Daly City engineering staff, the runoff coefficients used to design the original system were probably somewhat low. The problems that exist in the system are essentially located in the downstream facilities, and the City currently has a program for increasing the downstream capacity of the drainage system. According to City staff, there have been no drainage problems in the RPA.

IMPACT OF REDEVELOPMENT

A major impact of redevelopment on an area can be the alteration of the surface characteristics of the area. For

example, the conversion of planted areas to paved areas increases the storm runoff from the area. In drainage calculations a "runoff coefficient" is used in designing drainage facilities. The runoff coefficient defines the drainage characteristic of an area. For example, a runoff coefficient of 0.40 indicates that forty percent of the rainfall from a storm of design magnitude will run off the site. The RPA in its present condition is highly developed with respect to storm drainage, i.e. the runoff coefficient is high. Although the redevelopment plan will probably call for more intensive development of the RPA, the nature of that redevelopment should not increase the runoff coefficient for the area. The reason this is so, is that although the redevelopment plan may call for additional building floor area, that added floor area can be achieved without converting low runoff coefficient areas (such as planted areas) to high runoff coefficient areas. In fact, the addition of landscape elements could reduce the runoff coefficient of the RPA.

Section III

SANITARY SEWERS

The sanitary sewer system in Daly City is under the jurisdiction of the North San Mateo County Sanitation District (NSMCSD). However, a portion of the system is tributary to the San Francisco sewer system. With respect to the RPA, the sewers north of Mission and Wellington flow to the San Francisco system. The map on page 7 shows the sanitary sewers (including size and flow direction) within and peripheral to the RPA.

EXISTING SEWER SYSTEM

Treatment Plant

The capacity of the NSMCSD treatment plant is six million gallons per day (MGD), and the peak wet weather flow to the plant is approximately 6.5 MGD. Hydraulically the plant is able to handle peak wet weather flows. At certain times, during wet weather flows, the Regional Water Quality Control Board standards are not being achieved by the plant. The existing facility has approximately 0.1 MGD reserve capacity. The existing 6 MGD primary treatment plant is being expanded to an 8 MGD secondary treatment plant, and the new plant will meet all the standards of the District's National Pollutant Discharge Elimination System (NPDES) permit. This is a federal permit administered by the State of California. (States can administer these permits if the federal standards are equalled or exceeded by the state.) Mr. David Gehre, the NSMCSD manager, estimates that the new facility will have a reserve capacity of approximately one MGD.

Mission Street Sewers Tributary to San Francisco

The NSMCSD considers the sewers tributary to San Francisco to be in very good condition and that there is minimal infiltration in the system. In the past ten years there have been a few instances of sewage backing up into buildings or discharging out of manholes. According to the District Manager, foreign substances being deposited in manholes has been the cause of most of these occurrences. It should be noted that the San Francisco system is a combined sewerage system, i.e. it carries storm drainage as well as sanitary sewage.

RPA Sewers Tributary to North San Mateo County Sanitation District

According to the NSMCSD, the sewers in the RPA that are tributary to the District are in very good condition, and infiltration is considered to be minimal. There have been a few instances in the past ten years of sewage backing up into buildings or discharging out of manholes. These instances have occurred mostly as a result of foreign substances being deposited in manholes.

IMPACT OF REDEVELOPMENT

Treatment Plant

For the purposes of preliminary analysis, it has been assumed that there will be one person for every 200 square feet of new commercial and business office space. In this category the effluent per person is assumed to be 15 gallons per day average, and 30 gallons per day peak. For new residential development it has been assumed that there will be 2.2 persons per single family unit and that the effluent per person will be 75 gallons per day average and 150 gallons per day peak. Based on the above figures and the projected theoretical economic development levels, the total anticipated sewage flow from the redevelopment would be approximately 0.17 MGD. Of that total approximately 0.13 MGD would be from the residential component. The above figures include no infiltration allowance, since it is assumed that the redevelopment will require no new sewer lines.

Mission Street Sewers Tributary to San Francisco

For the purpose of analysis, it is being assumed that this portion of the sewer system will be impacted by approximately one third of the anticipated redevelopment along the Mission Street corridor. Since the existing system in this area was designed to handle storm runoff, the minimum computed pipeline capacity in Mission Street is over three cubic feet per second (CFS). The flow capacity rapidly increases in the

downstream lines . For example, the computed capacity between Evergreen and Templeton is over twenty-five CFS. The peak flow contribution by anticipated redevelopment would be approximately 0.01 CFS. This level of contribution is insignificant with respect to the existing sewer capacities.

Mission Street Sewers Tributary to NSMCSD

This portion of Mission Street is sewered in two sections; north of Jefferson Union High School, and south of the high school. The minimum calculated sewer capacity in the upper section is 0.9 CFS and in the lower section it is 0.7 CFS. The peak flow contribution by anticipated redevelopment in either section would be approximately 0.01 CFS. This level of contribution is insignificant with respect to the existing sewer capacities.

Junipero Serra Boulevard Sewers Tributary to NSMCSD

Junipero Serra Boulevard is sewered from John Daly south to the trunk sewer in the vicinity of Marchbank Park, and from Citrus north to the same trunk sewer. The minimum calculated sewer capacity in the area north of Marchbank Park is 1.4 CFS. The minimum calculated sewer capacity in the southerly area is 0.7 CFS. The peak flow contribution by the maximum anticipated redevelopment would be 0.31 CFS. On a theoretical basis there is sufficient capacity in the existing Junipero Serra sewers to accomodate the maximum level of anticipated redevelopment. However, if significant residential development is planned south of Marchbank Park, a field determination of actual reserve capacities within those lines would be justified. The trunk sewer in that area would appear to have more than adequate capacity.



LEGEND

- sewer line, 4-8 in. dia.
- sewer line, 10-14 in. dia.
- sewer line, 15 in. dia. & larger
- manhole { 200 = rim elev. in feet
195 = invert elev. in feet
- manhole, cleanout no.
- direction of flow, normal
- direction of flow, overflow condition
- cleanout or lamphole
- pumping station
- drop inlet at manhole
- sewers tributary to S.F. System
- grid boundary lines (w/ grid no.)

Note: information shown on this map compiled from North San Mateo Co. Sanitation Dist. Grid Maps

D3



0 1 2 3 4 500ft
February, 1976

SANITARY SEWERS

DALY CITY REDEVELOPMENT PROJECT REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER

PREPARED BY **RS&A**

Section IV

WATER SUPPLY

The Daly City water system has two sources of supply; City owned and operated wells, and San Francisco water supply lines. Approximately forty percent of the City's needs are supplied by the San Francisco water sytem, with the remaining sixty percent being provided by Daly City wells. Water mains, major system components, and selected static pressures and fire flows are shown on the map on page 10 at the end of this section.

EXISTING WATER SYSTEM

The water system within the RPA is in good operating condition. Electric pumps serving the RPA have an alternate automatic water supply that makes the system very dependable.

Mission Street Water Mains

Several static pressure readings were made along Mission in 1970. These pressures ranged from a low of 80 pounds per square inch (psi) to a high of 140 psi. Most of the readings were well over a hundred pounds. Based on modern design practice, a minimum pressure of 40 psi is desirable, and anything over 100 psi usually requires pressure reduction. Since the pressure readings were taken during the day they probably represent system pressures during periods of higher than average consumption. It can therefore be concluded that pressures are more than adequate for domestic consumption.

Five fire flow tests were made along Mission Street in 1970. These tests were made ata 20 psi residual, which is considered to be the minimum pressure necessary for pumping engines. The flows ranged from a low of 3,500 gallons per minute (gpm) to a high of 6,200 gpm. The average flow was 4,580 gpm. Generally speaking, these are good flow values for the structures within the Mission street portion of the RPA.

Junipero Serra Boulevard Water Mains

Pressure tests made in 1970 along Junipero Serra Boulevard ranged from 95 psi to 125 psi. As with Mission Street, it can be concluded that pressures in this area are more than adequate for domestic consumption.

There was one fire test conducted along Junipero Serra, and that produced a flow of 2,600 gpm at a 20 psi residual. That flow value is probably reasonable with respect to the existing structures located along Junipero Serra.

IMPACT OF REDEVELOPMENT

The existing water supply system should be quite capable of meeting the domestic demands of the maximum anticipated redevelopment within the RPA. Fire demands should probably be considered on a rational basis. That means that each significant structure should be considered on a basis of both code and fire underwriting standards in determining fire flow demands. Constructing buildings that are deficient with respect to fire protection standards not only presents a potential hazard, but can affect the fire insurance rating of Daly City. The anticipated redevelopment in the Junipero Serra Boulevard corridor, particularly the business office component, could be questionable with respect to the existing fire flow capacity in that area. The fire flow in that area could probably be increased substantially by making system modifications. The cost of such modifications should be weighed against the cost of the structural requirements and space limitations imposed by the existing system. Therefore, the economics of specific redevelopment proposals should be reviewed with respect to fire protection standards.



LEGEND

- water main 3 1/2" dia. & smaller
- water main 4" dia.
- water main 6" dia.
- water main 8" dia.
- water main 10" dia. & larger *
- S.F. Water Dept. main
- S.F. Water Dept. main (abandoned)
- hydrant
- meter
- mains not connected
- Δ well & no.
- ◻ reservoir & no.
- ◻ reservoir boundary
- 90 static pressure (p.s.i.)
- 3600 fire flow (at 20 p.s.i. residual)
- ▽ pumper truck inlet connection
- pipe reducer, cap or plug

PIPE MATERIAL **

- A.C. asbestos cement
- C.I. cast iron
- C. copper
- D.I. ductile iron
- G.I. galvanized iron (steel)
- P. polyethylene
- S. steel

*Dia. of mains 10" & larger shown by no. preceding pipe material code

**Pipe material shown only on mains 8" dia. & larger

Note: valves have not been shown—refer to Daly City Water Dept. Maps for valve locations.



0 1 2 3 4 500ft
March 1976

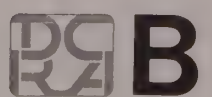
WATER SUPPLY

DALY CITY REDEVELOPMENT PROJECT

REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER

PREPARED BY



Section V

GAS AND ELECTRIC SUPPLY

Both gas and electricity are supplied to the RPA by Pacific Gas and Electric Company. Gas and electric supply information was compiled by the staff of the Redevelopment Agency of the City of Daly City on master sheets of the RPA. Because of prior agreements with the Redevelopment Agency and for security reasons, those drawings have not been included in this report

GAS SUPPLY

The entire RPA is serviced by existing gas mains. Theoretically, the gas supply could be readily expanded where necessary, to meet the needs of anticipated redevelopment. However, the California Public Utilities Commission (PUC) has restricted the use of gas, without approvals, to facilities requiring 50,000 cu.ft./day or less. In applying this requirement to proposed facilities, it is necessary to know the specifics of the applicable PUC rules and the energy requirements of the particular facility being considered. However, as a general guideline, it can be assumed that an apartment complex having 75 units or more, or a business office with a floor area in excess of 50,000 square feet has a potential for exceeding the 50,000 cu. ft./day limitation, as defined by the PUC. This would mean that such an apartment complex or office building might have to go to an alternate source of energy, such as light oil, for heating. Many structures in the Bay Area presently use light oil or other fuels for heating.

ELECTRIC SUPPLY

P.G. & E. says that it could provide the electrical needs created by anticipated redevelopment. Any part of the RPA that is not currently legislated as an Underground District should probably be so legislated prior to redevelopment. P.G. & E. would then be obligated to pick up a larger share of the cost of undergrounding.

Section VI
TELEPHONE SYSTEM

Daly City is served by the Pacific Telephone and Telegraph telephone system. Telephone system information was compiled by the staff of the Redevelopment Agency of the City of Daly City on a master sheet of the RPA. Because of prior agreement with the Redevelopment Agency, and for security reasons, this drawing has not been included in this report.

Within the RPA, Mission from John Daly to Market is served by an underground system and the remainder of the RPA has overhead service. Funds have been appropriated for undergrounding telephone on Mission from Theta to Templeton.

If Junipero Serra Boulevard is legislated as an Underground District a larger portion of the cost of undergrounding will be borne by PT & T. According to PT & T allocations for undergrounding are based upon population but the City can borrow on future allocations.

Providing that PT & T is given reasonable notice of planned redevelopment activity, they can accomodate the anticipated redevelopment.

Section VII

STREET LIGHTING & FIRE ALARM SYSTEMS

STREET LIGHTING SYSTEM

Street lighting ownership in Daly City is split between the City and P.G.&E. Generally speaking, street lighting located on electroliers are under City ownership, and those on poles belong to P.G.&E. Where the City owns the street lights it buys power and switching from P.G.&E. It is the policy of the City to have new street lighting installed on electroliers and for that lighting to have underground service. It is also City policy to usually assume ownership of new street lighting.

Mission Street: Existing System

Mission, from Market to Theta has underground service to a system about one and one half years old. This system was designed by the Daly City Electrical Department to serve the needs of a commercial thoroughfare. Funds for undergrounding the system from Theta Avenue to Templeton have been appropriated for the past one and one half years, however, the contract for the proposed work has not been let.

Mission Street: Impact of Redevelopment

The existing street lighting system from Market to Theta should be adequate for anticipated redevelopment in that area. The new lighting from Theta to Templeton should also serve the needs of anticipated redevelopment. The City of San Francisco is changing the support poles on their guide wires used in the Muni system for their electric bus route up Mission Street to San Jose. Since the street lighting poles serve as part of the support system for the Muni Service, new electroliers along Mission will have to phase with San Francisco's plans. The details of the Muni system will be analyzed with respect to the redevelopment planning for that area.

FIRE ALARM SYSTEM

The fire alarm system is owned and operated by Daly City. The existing system along Mission Street is probably adequate to serve anticipated redevelopment. The system along Junipero Serra may require modification to serve anticipated redevelopment. The determination of type and extent of modification, if any, would probably be done by the Daly City Fire Department.

Major components of the street lighting and fire alarm systems are shown on the following page.



LEGEND

Street Lighting System

- electrolier (w/PG&E identification no.)
- aerial service to electrolier
- underground service to electrolier
- pull box

Fire Alarm System

- fire alarm box
- box w/ aux. system connection
- aerial service to alarm box
- underground service to alarm box
- pull box
- fire station



0 1 2 3 4 500ft
February - 1976

STREET LIGHTING & FIRE ALARM SYSTEMS

DALY CITY REDEVELOPMENT PROJECT
REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA A JOINT VENTURE OF DAMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER

PREPARED BY **RAC**

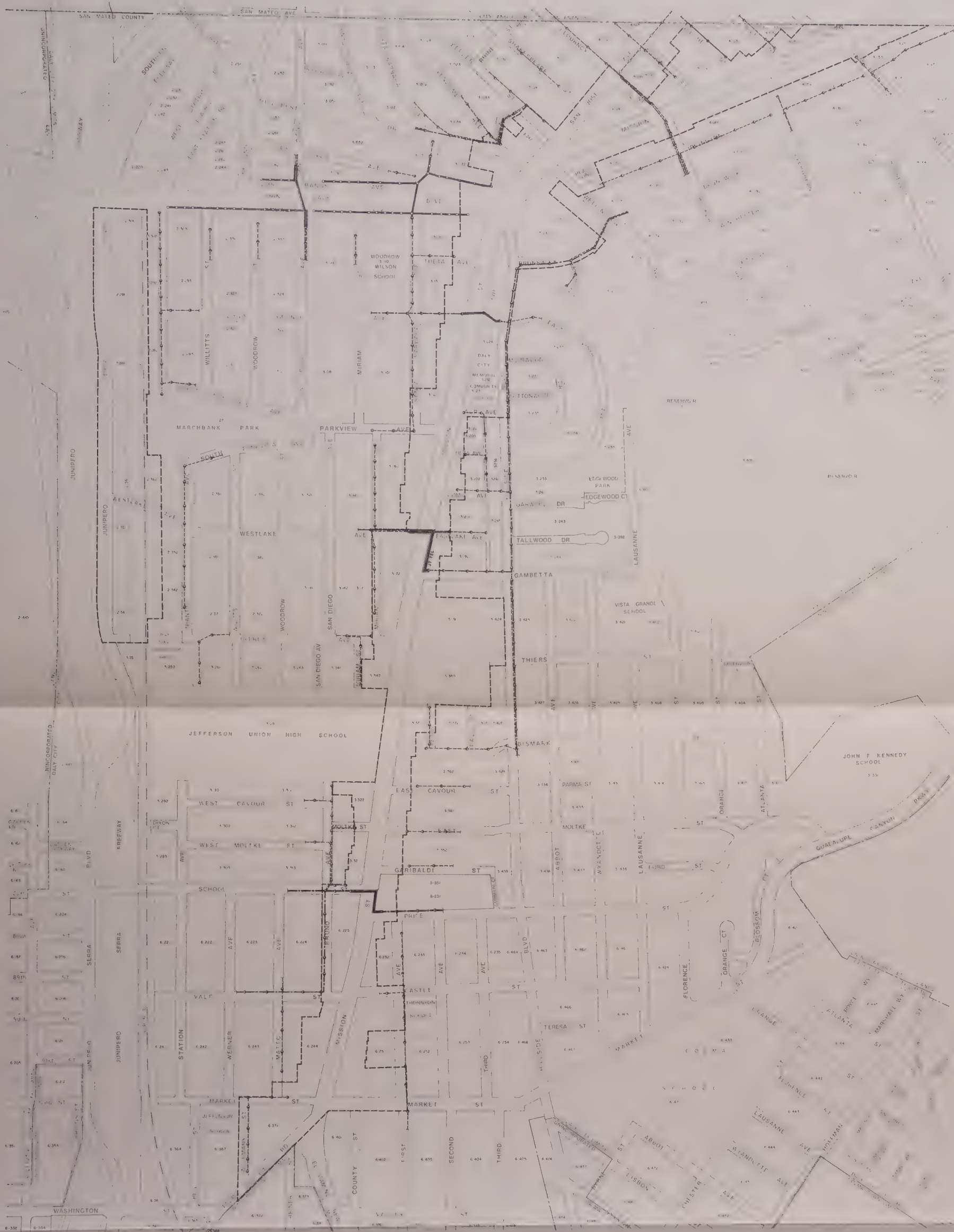
Section VIII

CABLE TV

Daly City is served by Vista Grande Cable, which is a subsidiary of Tele Communications Incorporated.

Cable television could be brought to residential development in the Junipero Serra Corridor. The cable could go into a joint trench with other utilities that would be undergrounded during redevelopment.

The cable television system within the RPA is shown on the map on the following page.



0 1 2 3 4 500ft
March 1976

LEGEND

- trunk main, aerial
- trunk main, underground
- - - distribution main, aerial
- distribution main, underground
- utility pole, P.T. & T. •
- utility pole, P.G. & E. •
- utility pole, P.T. & T. and P.G. & E. •
- joint trench (w/ P.T. & T.)
- underground service box

Note: information shown on this map compiled from Tele-Communication, Inc. records

• only those poles relevant to CATV Service are shown

CABLE TV

DALY CITY REDEVELOPMENT PROJECT

REDEVELOPMENT AGENCY OF THE CITY OF DALY CITY

DASA A JOINT VENTURE OF D'AMICO & ASSOC., INC., SENIOR JOINT VENTURE PARTNER/ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC., JUNIOR JOINT VENTURE PARTNER

PREPARED BY



Section IX

ACOUSTICAL & GEOLOGICAL CONSIDERATIONS

ACOUSTICAL CONSIDERATIONS

A noise monitoring program is being conducted in the RPA as part of the EIR analysis to be done with respect to the Redevelopment Plan. The noise environment will be assessed by four criteria, using the results of the monitoring program. The reason for using different criteria are first, the results of one criteria can be used to check the results of another criteria, and secondly, specific criteria relate to specific development components.

Based on the noise monitoring completed as of April 20th the preliminary conclusions are as follows:

1. Using California Office Noise Control Criteria for Land Use Compatibility; commercial, park, church, library, and hospital use are all acceptable.
2. Using California Noise Insulation Standards; residential buildings are unacceptable.
3. Using HUD Noise Assessment Guidelines; some residential buildings are acceptable, but most are unacceptable.
4. Using California Streets and Highways Code; schools are unacceptable.

The preliminary conclusion from the above accoustical analysis is that the residential component of any redevelopment plan should be reviewed in detail with respect to accoustical considerations.

GEOLOGICAL CONSIDERATIONS

Two faults potentially impact the RPA; the San Andreas Fault, and the San Bruno Fault. However, the San Bruno Fault, which passes through the RPA, has not been historically active. The San Andreas Fault, which has a long history of activity, passes from about two to three miles westerly of the RPA. The primary hazard in the event of a large earthquake would be

the effects of vibration. Settlement of natural ground should not be significant and it cannot reasonably be assumed that rupturing of faults under structures would occur.

In terms of anticipated redevelopment, it is reasonable to assume that costs related to soils and geological conditions will not be excessive.

Section X

PUBLIC SERVICES

FIRE PROTECTION

The RPA area lies in the response area of three fire stations, and is well within the recommended response distance for engine companies of one mile and truck companies of two miles.

In the opinion of the Fire Chief the fire apparatus used in protecting the RPA is adequate at this time. However, the facilities (fire stations) are adequate although somewhat limited.

There is a master fire station relocation plan that includes the relocation of two of the three stations. In the opinion of Chief Schrock, relocation of the two facilities would immensely improve the response within the RPA.

Any major facilities proposed for the redevelopment area should be reviewed with the Fire Chief.

WELFARE

There was no review made of welfare facilities for the purpose of this report since that element will relate more to the concise planning process than this problem identification analysis. If the redevelopment plan indicates a major residential component, that component will be reviewed with respect to welfare facilities. Also, the RPA will be considered for sites suitable to locating welfare facilities.

SCHOOLS

According to the Jefferson School District records, the District is slightly below capacity and has a declining enrollment. However the existing facilities are not well located. There are no current plans for new facilities or vacating existing facilities.

The Jefferson High School, according to the District's Assistant superintendent, has facilities adequate for the needs of its students. Additionally the facilities at the high school are used by a number of organizations during

the the entire school year. The District has no plans for new facilities or vacating existing facilities.

The Redevelopment Plan should consider the impact that a residential element might have on the school system. There does not seem to be a good potential or particular need for locating additional school facilities within the RPA.

ELEMENT I

MAY 1976

**EXISTING CONDITIONS
PROBLEM IDENTIFICATION**

SECTION E

AUTHOR: ALBERT R. SEYRANIAN, AIA, ARCHITECT & ASSOC.

URBAN DESIGN

**DALY
CITY**

REDEVELOPMENT PROJECT

PREPARED BY: THE DASA JOINT VENTURE

**D'Amico & Associates, Inc., Senior Joint Venture Partner
Albert R. Seyranian, AIA, Architect & Assoc., Jr. Joint Venture Partner**

**PREPARED FOR: THE REDEVELOPMENT AGENCY OF THE CITY
OF DALY CITY**

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Section I

INTRODUCTION

The purpose of this urban design study is to select, organize and analyze facts of existing physical, social and environmental features of the two parcels of the Redevelopment Project Area (RPA) in Daly City, San Mateo County, California. Parcel 1 (Mission Street Corridor) extends North-South on Mission Street from Templeton Avenue to approximately Market Street. Parcel 2 (Junipero Serra Blvd. Corridor), extends North-South on Junipero Serra Blvd. from John Daly Blvd. to the western most portion of Citrus Avenue. (See project boundary map "A")

Urban Design, for this purpose, is defined as the organizing and shaping of physical elements of urban setting in order to achieve a set of environmental and aesthetic objectives. Urban design is concerned with the design of individual elements only to the extent that the ultimate assemblage of urban parts is affected and is, therefore, not the equivalent of architectural design, although the design of buildings is affected. Nevertheless, even details can be of great importance in modeling the urban environment, particularly with regards to signs, planting, paving and other aspects of streetscape. Urban design, therefore, encompasses the formulation of the design process to accomplish the aforementioned details. A fundamental objective of any workable Urban Design study is to permit necessary latitude in

design between the Urban Design team and the community in order to express the quality of the physical environment. While this statement may appear to contain the seeds of contradiction, it should be apparent that excessive controls breed sterility of appearance and a conformity of purpose which depreciates the very essence of urbanity. It is for this reason that this study on existing conditions will touch problem areas related to physical, social and environmental features of the two parcels that comprise the RPA.

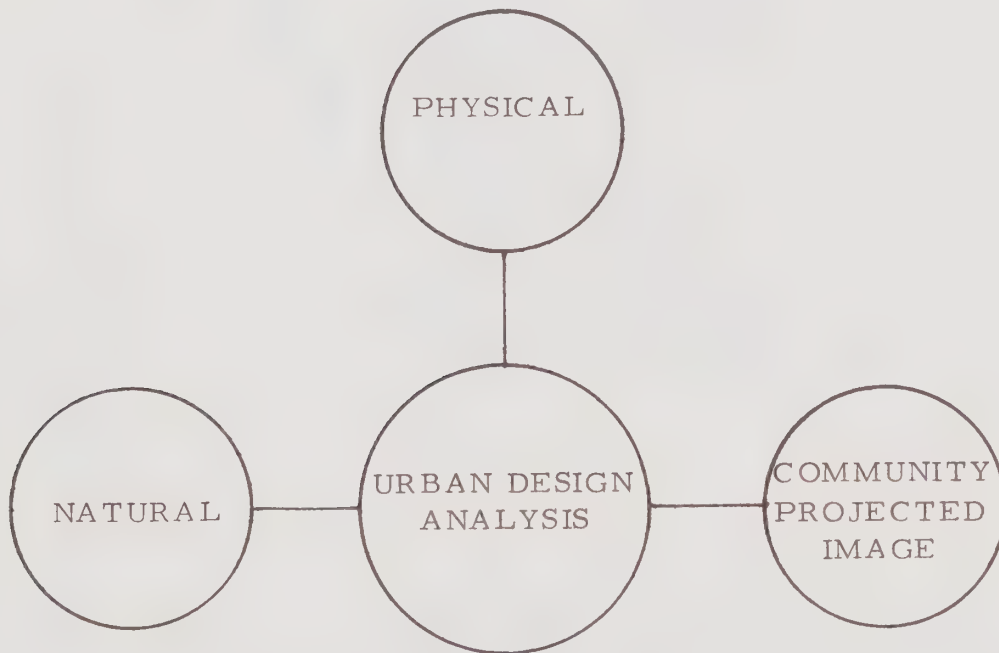
This division of Urban Design analysis overlaps in certain areas with the other Divisions of Element I. As an example, in dealing with the heading of vehicular and pedestrian circulation systems, this division focuses on the areas where pedestrian priority needs to be established. Therefore, careful consideration should be given at areas of high concentration of traffic and its relationship to pedestrians and bicycle routes. Traffic signs and signals will be another area where these street elements need to be coordinated in an aesthetic urban scene. Another consideration would be dealing with the interface of land use, from the planning division, to the massing of buildings. (Refer to page 9, Building Massing.)

The text of this division will first define the principle of Urban Design as it relates to the specific element of existing conditions. The problem areas will then be defined in relationship to areas in Parcels 1 and 2 of RPA.

URBAN DESIGN ANALYSIS

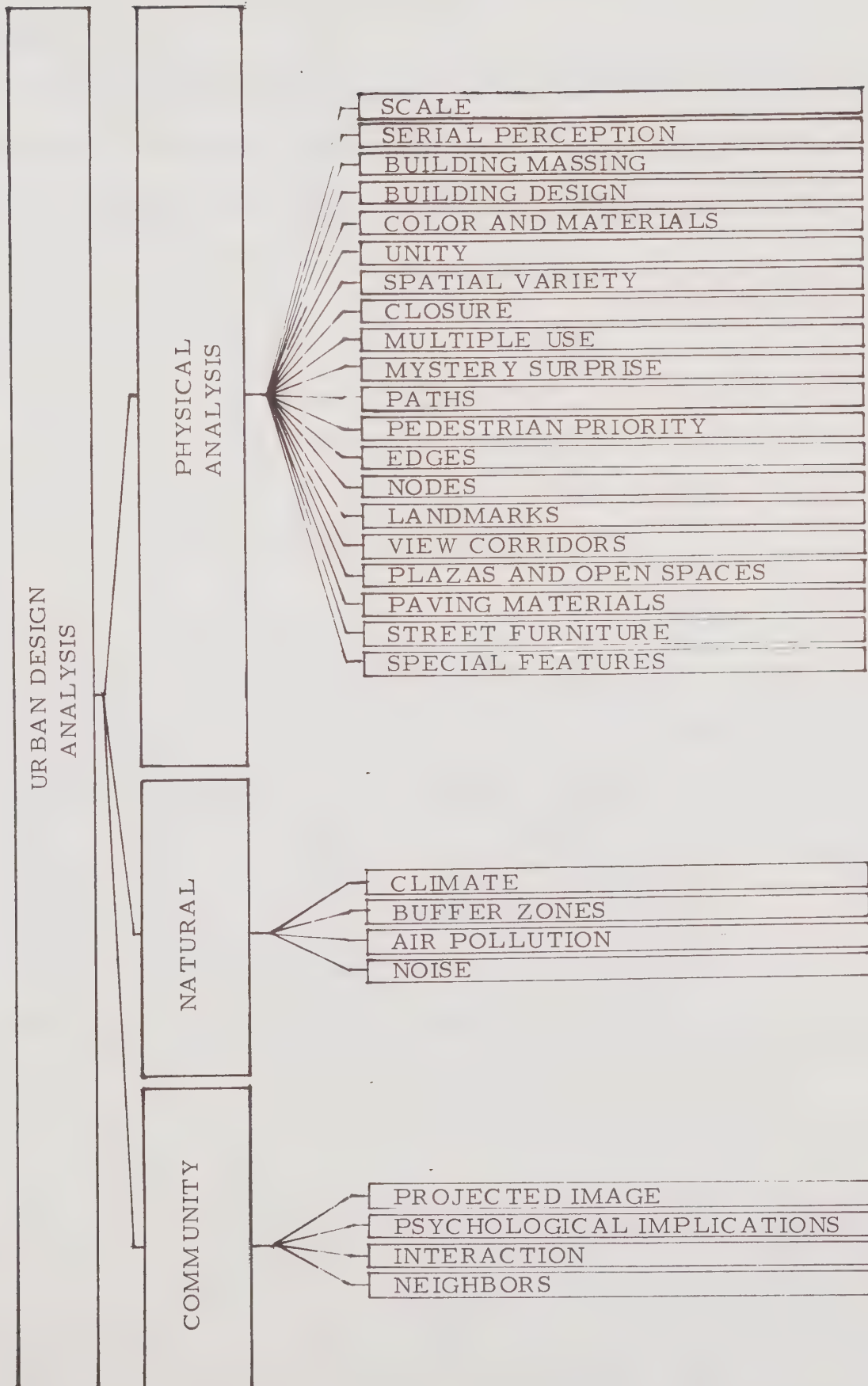
The Urban Design system of existing conditions has been analyzed under three major subgroups. These subgroups relate to the specific components which affect the Urban Environment. The following have been used in the development of this study.

1. Physical Analysis
2. Natural Attributes Analysis
3. Community Analysis



B. URBAN DESIGN ANALYSIS SUBGROUPS

C. URBAN DESIGN ANALYSIS



SCALE

Scale for this purpose is defined as the relationship of individual persons to the physical elements around. Often, scale is considered in relationship to speed and velocity. An appropriate scale in a physical environment is the one where an individual is not overwhelmed by immense distances and massive structures.

This kind of relationship of scale does not seem to exist on either of the parcels of RPA. It is very hard for a person to relate scale while walking along the corridor of Mission Street and Junipero Serra Blvd., because of the frontage oriented facades and the fast moving traffic. One tends to get a feeling of endless distance along these corridors. However, there are areas of residential scale which should be preserved. A careful consideration needs to be given to the preservation of human scale as it relates to the different uses of buildings and their relationship to open spaces. Because of a lack of the principle of scale, even some buildings of good potential use like the Daly City War Memorial Community Center and the John Daly Public Library are not being used to their full extent.

SERIAL PERCEPTION

Ideally, as one approaches and then enters an urban environment, elements are revealed sequentially as a series of dramatic visual events, each reinforcing the total aggregate experience of the viewer. In practice, it is difficult to create a new and effective series of such events without an already existing environment. It is recommended that certain nodes, edges and landmarks like Marchbank Park and the Daly City War Memorial Community Center be established as constraints, and proper locations of new structures, if any, be placed and designed to convey a concept of serial perception leading to these areas.



D. Daly City War Memorial Community Center as a focus for Serial Perception

UNITY

Visual unity is an important factor in the creation of a satisfactory townscape. Unity need not be purchased at the expense of individuality of expression, but does require a co-operative and sensitive approach to development. Single elements of the streetscape should not so dominate the scene that they destroy the complimentary characteristics of the remaining elements of an urban composition. The buildings which are badly out of scale with their neighbors are frequent offenders. A good example would be the Mission Street Corridor where there is a mixture of seriously different, non-compatible uses existing together.

Conversely, unity can be created among disparate urban elements by introducing organizing features. Street trees and other landscaping devices are particularly effective for such purposes. This sense of unity is desired in the development of Parcels 1 and 2.



E. Non-compatible Structures

BUILDING MASSING

The Building Massing is defined as the relationship of size in terms of volume and dimension. The massing of architectural buildings plays an important role in shaping the physical environment. One central purpose of massing is to prevent the gross incompatibilities between nearby buildings and neighborhoods. Another important aspect of massing consideration is to preserve a decent, humane environment at the street level.

There are no massing relationships between buildings on Parcels 1 and 2. This incompatibility has lead to a lack of indentifiable human scale within the existing corridors. The interface of the massing of buildings on the Mission Street Corridor with the adjacent residential structures is very important. Any new structures to be developed on Junipero Serra Blvd. should consider the massing relationships with existing low rise residential character.



F. Typical Existing Massing along Mission Street Corridor

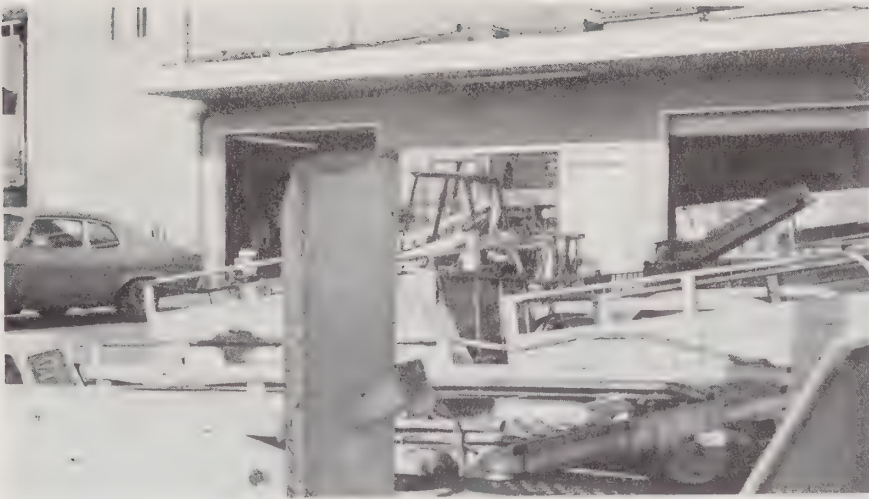
BUILDING DESIGN

Building design for this study is defined as a building envelope derived from function and its relationship to the urban form.

In the two parcel areas there are very few structures that have building design merits. Existing buildings along Mission Street and Junipero Serra Blvd. extend an image of post World War II strip-oriented commercial facades. This is not an unusual feature in Urban Renewal areas. However, new structures with architectural design merits can add tremendously to the aesthetics of these corridors. Certain building design features like canopies, bay windows, projections, etc., can create interest to the overall building facades of both the new and the rehabilitated buildings. Within the design constraints of the local and applicable codes, the building design can be geared to the objective of the best overall urban form. New buildings along the Mission Street Corridor should relate to the existing minor residential streets in terms of physical form relationships.

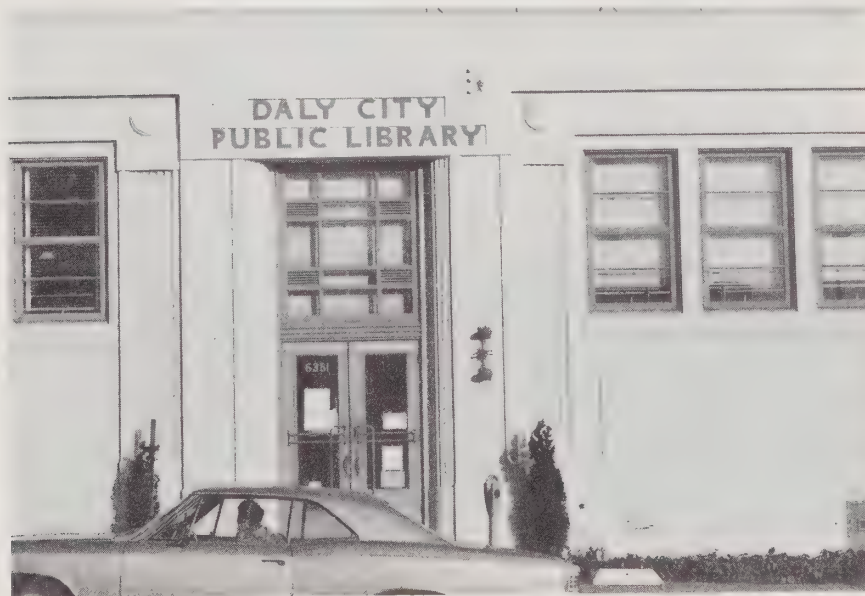
There are a few existing buildings, both on Mission Street and Junipero Serra Blvd., which have some architectural merit in terms of appearance and materials. These are hard to find, but wherever possible, they should be considered to be interfaced with the overall urban design.

After careful survey of existing conditions, buildings like the Bank of America on Mission and San Jose Avenue, the Daly City War Memorial



G. Examples of Existing Building Design

Community Center, the Public Library, Lasswell's Mortuary, and other buildings of similar merit should be considered in the urban design. .



H. Building Design of some merits

COLOR AND MATERIALS

The choice of color and materials is personal and rather subjective. However, within these latitudes expert guidance on aesthetic and functional matters is very useful. While driving on Mission Street Corridor, one feels a lack of consideration for this quality.

Some buildings simply consist of stucco and windows and unimaginative colors and detail. A few other buildings are overly expressed in color and materials such as glazed tiles of wild colors. Almost all buildings existing, as evident in this typical photo, are not coordinated together.



I. An Example of Unimaginative Use of Color and Materials

SPATIAL VARIETY

It is a good urban characteristic of an area where variety of spatial areas are encouraged. There is a need for visual /aesthetic as well as functional reasons to provide such variety. The spatial areas of different sizes tend to create interest and variety of activities in terms of pause and repause, eating, reading, brief sojourn and interaction. The gradual and sequential revealing of new scenes also fits the objective of the principle of SERIAL PERCEPTION, discussed earlier. The Mission Street corridor of Parcel 1 lacks the spatial variety to an observer, such as the fact that there are no spatial openings for people to sit and relax in malls or street areas. It is intended that within this corridor areas with spatial qualities be encouraged.

CLOSURE

To create a totally differentiated environment effect, some spaces need to be enclosed. Such spaces are missing in Parcels 1 and 2 of RPA. These kinds of spaces are useful in an urban environment to sustain the need for variety and visual impact. Excellent and striking examples of such spatial characteristics are found in San Francisco at the Cannery and Ghiradelli Square.

MULTIPLE USE

It has been found that "dissimilar" uses often thrive in juxtaposition to each other. For instance, after the peak hour of the day, an area that consists of specific uses only, would not be usable in the evenings, unless such evening uses are considered. These kinds of characteristics do not exist in this RPA. The Marchbank Park in Parcel 2 and Daly City War Memorial Community Center and other open spaces on Parcel 1 have a potential of multiple use.



J. Daly City War Memorial Community Center. - A potential of multiple use.

MYSTERY AND SURPRISE

This principle of urban design which is seldom found in urban areas would consist of techniques of creating the elements of surprise throughout the RPA. However, an element of surprise which exists or which is inadvertently created, adds life to the urban scene. Small "off the track" open spaces containing unusual artifacts, interesting vistas, intriguing shopping and eating opportunities seem not to exist in this RPA.

PATHS

Paths are the channels along which the observer customarily, occasionally or potentially moves. There are no significant paths in the RPA. However, paths could be directed to and from such open and landscaped spaces as Marchbank Park on the Eastside of Parcel 2 or the Daly City War Memorial Community Center on Mission Street.



K. Paths could lead to Marchbank Park.

PEDESTRIAN PRIORITY

In dealing with pedestrian priority, an interface with the Traffic Division of this Element I should be considered. Certain traffic nodes like the crossing of John Daly Boulevard and Junipero Serra Freeway, Mission Street and John Daly Boulevard could be handled carefully in relation to pedestrian movement. Another example of pedestrian priority could be considered on the West side of Parcel 2 at the railway crossing and the Marchbank Park.



- L. Pedestrian Priority is desirable at the crossing of the railroad track and the Marchbank Park.

EDGES

Edges are the linear elements not used or considered as paths by the observer. They are the linear breaks in continuity, such as railroad cuts, edges of development, walls, etc. Such edges may be barriers, more or less penetrable, which close one region off from another, or they may be seams, lines along which two regions are related and joined together. In Parcel 2, this definition relates to Junipero Serra Boulevard on the West, John Daly Boulevard and the Bart Station on the North. The S. P. railroad track on the East is another barrier edge on this parcel.



M. Example of barrier edge on Parcel 2.

NODES

Nodes are significant points, interesting or uninteresting. They are primarily junctions, places of break in transportation, crossing, convergence of paths, moments of shifts from one another, or the nodes may be simply concentrations which gain their importance from being the condensation of some use or physical character, such as a street corner hangout or an enclosed square.

Marchbank Park is a good example of a node for an open space. The junction of John Daly Boulevard and Juniperro Serra is a vehicular traffic node. In Parcel 1, junction of Mission Street and John Daly Boulevard is an example of a node. The Daly City War Memorial Community Center is another example of an important consideration of a node.



N. Traffic Node

LANDMARKS

Landmarks are another type of point of reference , but in this case the observer does not enter within them, they are external. They are usually rather simply defined physical objects: buildings, signs, stores or a mountain. Parcels 1 and 2 however, tend to confuse an observer in terms of any such exciting landmarks. One can see innumerable signs, store fronts of unorderly display, creating a non-exciting visual sequence, and definitely no landmarks to relate to surrounding areas.



O. Example of non-existence of any landmarks.

VIEW CORRIDOR

Some view corridors presently exist, others could be proposed and accomplished. Some of the existing view corridors exist looking West and South from higher planes of Mission Street Corridor. These corridors have the potential of distant views and should be enhanced through careful consideration of building design, heights and landscaping adjacent to the zone of clear view. Some identified view corridors and view corridor potentials are illustrated in the following photographs.



P1 View Corridor looking West.



P2 View Corridor looking South



P3 View Corridor potential not being utilized because of both visual and physical barriers.

PLAZAS AND OPEN SPACES

There are practically no community open spaces except Marchbank Park on the East side of Parcel 2 and the Daly City Memorial Community Center on Parcel 1. The lack of open spaces discourages community interaction, opportunity to permit repose, to add interest and to admit light and air.

The Mission Street Corridor could be handled with informal or highly structured open spaces. The existing open areas need to be supplemented with additional landscaping.

Formal, structured open spaces represented by malls and plazas require careful consideration of proportion, unified design treatment, paving materials, sculptures, accents or highlights, lighting and environmental control.

Neighboring open spaces like Marchbank Park should be co-ordinated with new architectural buildings to encourage pedestrian flow. It may be considered that the landscaping of this park be supplemented with smaller open spaces created by the new structures.



Q1 The Marchbank Park - an example of community open space.



Q2. An example of potential open space used as a car lot

PAVING MATERIALS

The use of varied paving materials adds richness to the urban landscape. In particular, surfaces devoted to the pedestrian should be given a range of treatments depending upon location. Paving materials can function to provide articulation, the change in character from one locale to another and effective non-verbal descriptions.

There is no effective existing paving pattern whatsoever on Parcels 1 and 2 of RPA. The sidewalks stop at the asphalt streets and are merely continued by means of only white painted lines; where these could be brickpavers.



R. Existing paving materials lack richness.

STREET FURNITURE/STREETSCAPE

The term encompasses all of those artifacts which are used to enhance the function and amenity of Mission Street and Serra Blvd.

The composite effect of street furniture (light poles, signs and signals), can encourage the development of superior streetscape environment.

Street furniture includes:

- a. Fire hydrants
- b. Planters
- c. Benches
- d. Trash receptacles
- e. Directional and informational graphics
- f. Telephone booths
- g. Light poles

To a visitor and even to residents, the interesting streetscape can be conducive to a stimulating environment. Existing conditions in the Mission Street Corridor and Junipero Serra Blvd. present an unpleasant streetscape. This can be observed while driving North-South on Mission Street and other minor streets. The streetscape can be enhanced through proper handling and design of various components of Urban Design. The following photographs of existing conditions convey a typical streetscape pattern.



S1. Existing streetscape element



S2. Incompatible street furniture.



S3. Existing fire hydrant

SPECIAL FEATURES

In addition to street furniture, the Urban Design scene can be enhanced with special features like kiosks, fountains, community bulletin boards, weather bubble seats, etc. In appropriate locations, special features like banners, pendants, wall "graffitti" and murals can add to the quality of the urban environment.

The special features explained above seem not to exist on either of the two parcels of the RPA. A consideration should be given to the design relationship of these features, to the street furniture, and the overall streetscape.



T. Existing streetscape with unsightly features.

Section III

NATURAL

EXISTING CONDITIONS

Junipero Serra Boulevard Corridor:

Significant vegetation in this area is limited to the low brush weed and grasses on the slope behind the homes of Niantic Avenue and infrequent pockets of sparse plantings interspersed in random fashion throughout the corridor. Of the two areas the slope growth is the most significant primarily due to its extensive area. Young and as yet inconspicuous, street trees exist along the west side of Junipero Serra Boulevard.

Of utmost significance to this area, however, is the stand of Monterey pines on the west end of Marchbank Park and the State plantings along the Junipero Serra Freeway. Neither group of vegetation is within the project limits, but their effect on the corridor should be carefully evaluated. The visual impact of the Park's tree grouping is a dominant feature in this landscape. The visual noise, fume, and wind screening afforded by the Freeway landscaping is a highly desirable feature.

Mission Street Corridor:

There are basically only two vegetative features to this entire corridor with the stately fan palms in the center medians being the most predominate. Unfortunately, their restricted growth and one hundred foot spacings provide a basic framework in need of additional

support vegetation. The grounds along Mission Street in front of the War Memorial building provide this corridor with its remaining spot of major vegetation. Sporadic and small pockets of plantings exist but are insignificant in the overall urban strip.

Both the Mission Street Corridor and the Juipero Serra Boulevard Corridor are predominately affected by the westerly winds as they dry-burn, uproot and deform trees in their struggle to survive. This climatic affect coupled with little regular watering and little maintenance make it a difficult environment in which major vegetation may survive.

DESIGN CONSIDERATIONS

Climate:

While Daly City and specifically the two corridors are composed of a number of small ecoclimates, the climate (wind conditions excepted) in general is conducive to good plant growth. New planting should be carefully evaluated with respect to tolerating the wind and at the same time improving the general local environment for human use.

To combat the disfiguring, drying and uprooting forces of wind in these two corridors, careful study of tolerant species, selection of well rooted material, grouping and locations of plantings, provisions for watering, improved staking and thinning-maintenance practices should be employed.

Residential Buffers:

Many residential areas abut the project limits and should be adequately buffered where feasible. Specific areas such as the existing slope along the rear fences of homes along Niantic Avenue could be heavily planted in shrubs and trees to provide a vegetative buffer for wind, noise, fumes and glare.

State Restrictions:

Since Mission Street is a State highway, certain standards or design criteria of Caltrans should be incorporated in the overall design of this corridor, especially with regard to street tree placement. These standards are intended to improve traffic safety for freeway and highway systems. A review of such standards and intent coupled with actual usage of the corridors and accident records might indicate a need for flexibility in the standards as they are applied to the specific project design.

Should the State restrict further palm plantings in the Mission Street median, it might however, permit transplanting to improve the visual impact of the trees. This concept and others should be explored early in design stages with Caltrans. Stringent restrictions could also be reflected in increased demand for major plantings on private property to provide suitable mitigating vegetation.

Plant Lists:

Due to the wind, varying soils and maintenance practices of trees in these areas, growth sizes and shapes are somewhat distorted from the norm. Documentation of these results as well as specific plant lists of suitable planting would prove useful in a realistic approach to overall vegetative master planning. Closer spacings and use of mass or group plantings are two factors which could improve the effectiveness of new plantings.

Strip/Corridor Space:

Both corridors in being basically devoid of plantings flow endlessly in a chaotic collection of architectural styles, forms and scales. Through the use of tree groupings and street trees a sequence of interesting smaller scaled spaces could be created. These smaller spaces could highlight sections of the corridors, create vistas, improve views, and enable the streets to be more comprehensible to pedestrians and motorists.

Preservation of Existing Vegetation:

The lack of vegetation in both corridors highlights the need to preserve and to augment plantings at the War Memorial Building, Marchbank Park tree buffer, and the Freeway landscaped slope. The visual and scenic aspects of the War Memorial Building and the Park are very significant. The positive impacts in reducing noise, glare, fumes and wind along the

Freeway frontage should not be overlooked.

The preservation of other spotty plantings, with the exceptions possibly of single trees, should be reviewed and judged with respect to the improvements and gains in the overall design.

Noise Buffers:

Unless dense buffers of plantings in excess of thirty to forty feet in width can be obtained little actual noise can be abated through plantings. However, even a narrow hedge of four feet in width can often provide significant psychological "buffering" to warrant their use. The use of plants to deflect and diffuse noise could be important design considerations in improving the corridor environments for pedestrian use.

Air Pollution:

Through the daily cycle of growth, plants will filter air, removing dust, fog, objectionable odors and pollutants, Care should be taken to use plants capable of tolerating such quantities of materials while at the same time providing a pleasing aroma of their own.

Glare Reduction:

The extensive areas of pavement and building surfaces reflect a tremendous amount of sunlight. The hours of darkness in an urban environment also produce an endless barrage of street lights, sign

lights, and automobile headlights. Such adverse affects can be mitigated through the strategic location and careful selection of plant types to block, screen, filter or deflect such glare.

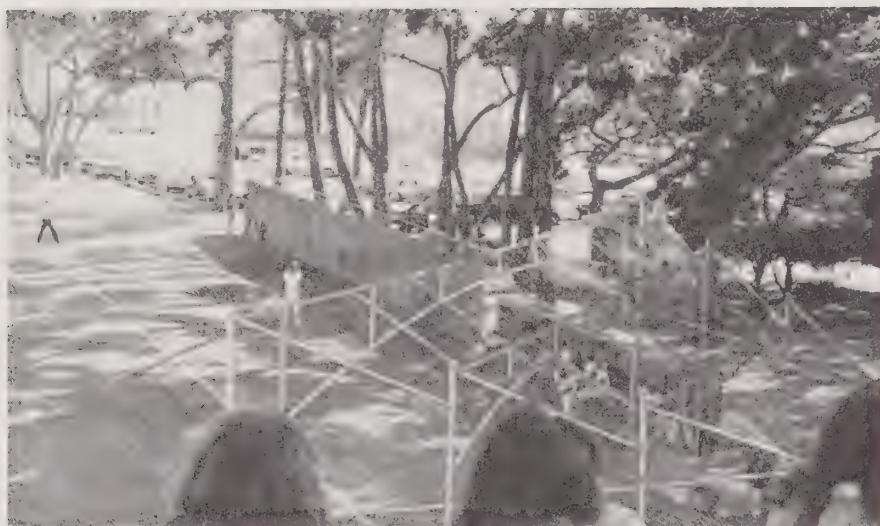
Section IV

COMMUNITY PROJECTED ENVIRONMENTAL IMAGE

In addition to the enhancement of physical environment, studies related to the analysis of facts and needs of the community, in terms of social and psychological environment are very essential. The image and the environment should reflect community characteristics and their aspirations.

Environmental images are the result of a two way process between the observer and his environment. The observer, with great adaptability and in the light of his own purposes, selects, organizes and endows with meaning what he sees. The image so developed, now limits and emphasizes what is seen, while the image itself is being tested against previous observations in a constant interactive process. Thus the image of a given reality may vary significantly between different observers.

As manipulators of a physical environment, urban designers need to be sensitive to the social considerations which produce the environmental image. Different environments resist or facilitate the process of image-making. Any given urban form will have a high or a low probability of evoking a strong image among various observers. Presumably, this probability can be stated with greater precision as the observers and community residents of RPA are grouped in classes of age, sex, culture, occupation, temperament or familiarity. Each individual creates and bears his own image, but there seems to be



U. Marchbank Park - an example of community interaction.

substantial agreement among members of these groups. It is the simulation of these images, exhibiting consensus among community groups, that interest Urban Designers who aspire to model a social environment that will be used by many people.

Therefore this study will tend to pass over individual differences, interesting as they might be to a psychologist. The first order of business will be what might be called the "public images", the common mental pictures carried by the community living in and around Parcels 1 and 2. This process will lead to a simple physical reality of a basic physiological nature.

CONCLUSION

This study has touched various elements of urban scene which relate to Parcels 1 and 2 of RPA. It has tried to define certain problem areas. If urban design is going to work as a total system, it will have to work simultaneously with other subsystems and subsequently, elements of the subsystems to create a realistic, effective environment to the community of Daly City. It is recommended that the existing conditions interface with other disciplines and design processes which involve maximum citizen's participation in creating the urban environment.

It is assumed that the potentials and constraints established by this analysis on existing conditions will lead to an appropriate urban design pattern.

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